

access

INTERNATIONAL

Volume Twenty Four | Issue Five | August-September 2017

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access

50

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Access International is published seven times a year (Jan-Feb, March-April, May, June-July, August-September, October, November-December) and has a worldwide circulation of more than 8000. Access International is only available to subscribers (IPAF members receive a free copy, details available on request). Annual airmail subscription rate £130, US\$210, €155.



Changing gears

It has been a year of change in the world of access and, as I write, we are still well within the third quarter, meaning there is still plenty of time for more major industry news to develop.

In this issue of *AI* we have the **access50** listing of the world's biggest rental companies, ranked by fleet size, which very much reflects these changes. The rental sector has seen United Rentals acquire NES in the US, then Loxam buying out Lavendon, following a bidding battle with TVH Group. Not to be left out, TVH swiftly took ownership of Gardemann – the German rental company that had been part of Lavendon – in a follow up deal with Loxam. The acquisition trail doesn't end there, with UK-based AFI Group buying fellow specialist Kimberly in July, and in the US H&E Equipment confirming it was to buy Neff Corp., until United put in a better offer, which has now been accepted, but not before H&E pulled out of the bidding.

Combine this with recent movements in the manufacturing sector, including acquisitions and new names, and you have an industry that is in transition. Three of those relatively new manufacturers, all based in China, are included in this issue of the magazine. Sany Palfinger, LGMG and XCMG have all set up access divisions, which demonstrates the importance generalist manufacturers in China are attaching to access equipment. *AI* visited the head managers of the three companies to interview them about their plans.

A vast majority of Chinese manufacturers looking to grow in the country and wider Asia will be at the APEX Asia exhibition, taking place 31 October – 3 November in Shanghai, as will those from the established markets like Europe and North America. The show is held parallel with CeMAT ASIA and is organised by KHL Group and BV Industrial Promotions International (IPI), in cooperation with Deutsche Messe AG.

See some of the launches set for the show in the APEX preview in this issue. It will be followed by the comprehensive Showguide in the next issue – October – of the magazine.

One of the reasons for the fast-past change in the global access sector is that it is a relatively young industry in which entrepreneurial spirit abounds. This subject was picked up by Eline Oudenbroek, who has just stepped down as managing director of Holland Lift after entering the access industry for the first time in 2013. She said, "I love the access industry. The business is still full of the original owners and pioneers."

Euan Youdale
Editor

“ Many Chinese manufacturers will be at APEX Asia, 31 Oct – 3 Nov, in Shanghai, as will those from Europe and North America. ”



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ACCESS PORTFOLIO

The paper in this magazine originates from timber that is sourced from sustainable forests, managed to strict environmental, social, and economic standards. The manufacturing mill has both FSC & PEFC certification, and also ISO9001 and ISO14001 accreditation.

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These products ascribe well to the general view that AWPS are getting bigger and more powerful, while environmentally-friendly machines are top of the design strategy, as are the implications of new standards in North America.

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Steel producers in India are utilizing aerial work platforms in a big way as they discover their numerous benefits for regular plant maintenance. Partha Pratim Basistha reports from Tata Steel.



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It's been a dramatic year for the Access50 listing of the world's biggest access equipment rental companies, thanks to a number of major acquisitions and a strong showing in the sector overall.

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China's largest aerial platform manufacturers will line-up alongside the access market's big global players at APEX Asia, the first dedicated aerial platform exhibition to be held in China. AI reports.



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ON THE COVER

It's been quite a year for many of the rental companies featuring in this year's Access50. Discover all the changes on page 22.



MEMBER OF



Access International, ISSN:1352-7517, is published monthly by KHL Group c/o SPP, Emigsville, PA and additional entries. Periodicals postage paid at Emigsville, PA. Postmaster: send address corrections to Access International c/o SPP, PO Box 437, Emigsville, PA 14318.

Printed by: Warners Midlands PLC, UK.

ISSN No: 1352-7517
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IN BRIEF

■ Following **A-Plant's** purchase of Interlift's trade and assets from EY, the administrators of Hewden in November 2016, A-Plant has announced the Interlift operation has been re-branded and integrated into A-Plant's FLG Services business, creating the UK's largest dedicated lifting and safety provider. Following this successful integration, FLG Services now has 24 service centres across the UK, offering lifting and safety equipment for hire or purchase.

■ Ashtead Group's North American business **Sunbelt Rentals** has signed an agreement to acquire CRS Contractors Rental Supply (CRS) for an initial cash consideration of C\$275m with an additional earn out of up to C\$20m dependant on future performance. CRS is a leading provider of rental equipment in Ontario, Canada employing more than 400 people across 28 locations. The acquisition, which is subject to certain regulatory approvals, is expected to complete in the next few weeks.

■ **The Manitou group** has finalised its acquisition of a majority stake of 55% in the Australian company LiftRite. Thanks to a supplementary call option, the group will hold a 96% share by 2020. A family-owned company founded in 1983 by George Hogg, Mark Manning and Ted Hirschfeld, LiftRite distributes Manitou, Gehl, Kalmar and Kobelco products for the construction and mining markets. In 2016, the company generated €12 million in sales revenue, of which Manitou Group products accounted for 65%.

■ **Eazi Access**, JLG's distributor for Southern Africa, has invested in a range of JLG machinery for its access fleet and sales division. The deal was for 178 JLG units valued at \$9m, \$2.7m more than its previous order. The deal included the new 1500AJP, the world's tallest articulating boom lift with a working height of 48.15m, which is the first of its kind in Africa. Eazi Access is Africa's market leader in the rental, sales, servicing and training of work-at-height. The company offers the largest and most diverse fleet of boom lifts, scissors, telehandlers and vertical lifts on the market.

AFI acquires Kimberly

UK-based AFI has acquired the business and assets of Kimberly Rentals Group. The deal further strengthens AFI's position within the powered access equipment rental sector bringing its annual turnover to nearly £100m (\$130m).

AFI is backed by private equity investors Rutland Partners and has acquired Kimberly from Lloyds Development Capital (LDC). The acquisition has also been funded through an increased senior debt facility from the group's financiers PNC and will bring the number of machines in its rental fleet to more than 7000.

In 2016, AFI increased its turnover by 19% to £75m thanks

to organic growth, with the opening of new depots in the Middle East, and through the acquisition of Rapid Platforms in October 2016. Business this year has continued to be encouraging, said the company, with strong year-on-year growth as it continues to build its presence in the UK and Middle East.

Kimberly, a leading business in the UK powered access rental market, was established in 1994. It has six depots across the UK, including London, the North West, Yorkshire and Scotland, and during 2016 saw turnover of around £13m (\$17m).

David Shipman, chairman of AFI commented, "2016 and 2017 have been significant years in

the development of our growth story as we continue to build our position in the powered access equipment rental market." ■

TVH ACQUIRES GARDEMANN

TVH Group has acquired Gardemann, the German access rental business owned by Loxam. The price has not been disclosed.

Loxam sold Gardemann a matter of months after acquiring it as part of its takeover of Lavendon Group earlier this year, a takeover that it contested with TVH. All shares of Lavendon (Deutschland) Holding have been transferred to TVH.

The deal means that TVH will own the two largest access rental businesses in Germany, adding Gardemann to the Mateco business that it acquired in 2012. The deal also means that Loxam will have owned Gardemann for less than six months.

Loxam said, "This transaction enables Loxam to shift resources to other markets in Europe and in the Middle East, and to allow the development of its general plant rental activities in Germany which remain a core area of focus."

TVH said the acquisition represented a unique opportunity to unite the two leading brands.

Pascal Vanhalst, TVH Equipment CEO, said, "This combination will create a highly successful team, with a clear focus on providing the customer with an excellent and satisfactory service."

Double Co.me.t launch

Co.me.t is launching two new trucks mounts aimed at rental companies.

The two models broaden the Italian manufacturer's Eurosky range and have 18m and 21m working heights with double articulated Z-booms and H+H stabilisers. They are aimed at those requiring a simple, high quality

machine, said the manufacturer.

The Eurosky 18-2-7.5 HQ and 21-2-8.5 HQ models are hydraulic and have low pressure systems for a longer life. The basket has a 250kg capacity and can be installed on Iveco, Nissan and Renault chassis. They join the complete range of 14m to 33m working height models. ■



Co.me.t launches a pair of Eurosky models

2 Cousins Powered Access has become the first ever JCB scissor lift customer in the world following the launch of JCB's Access division. It bought a S1930e – one of nine electric scissors introduced by JCB Access when it launched in February.

UK, Oxford-based 2 Cousins' managing director, Jason Prisley said, "The company is under new leadership and we want to make our mark. There is no better way than to write our name in the history books as the first ever JCB Access customer in the world."

JCB then announced Briggs Equipment - one of the UK's largest fork lift truck and materials handling providers - has added 10 JCB scissor lifts to its rapidly growing access platform fleet.



IN BRIEF

■ Australia-based **Want Access** has reached a fleet size of 600 with the delivery of a new Haulotte HT23RTJ Pro 23m telescopic boom, which also represents a move into larger equipment for the company. Paul Sultana, Haulotte, with Kay Brown, Nick Cjveticanin and Chris Ryan from Want Access with some of its Haulotte fleet. Want Access has experienced rapid growth since it started in March 2014, and the intention is for that to continue to grow with expansion into other states.

■ Turkish rental company, **Fatih Vinc**, has purchased 35 Snorkel lifts from distributor Uzman Lift. The deal includes 21 Snorkel electric scissor lifts, seven Snorkel compact rough terrain scissor lifts, three Snorkel electric boom lifts, plus a T46JRT telescopic boom lift, two Snorkel TM12 telescopic mast lifts and a Snorkel S3010P push around mini scissor lift. The majority of the lifts will be delivered immediately from Uzman Lift stock, with the remaining lifts shipping from the Snorkel manufacturing facility in the U.K.

■ **Palazzani** has delivered a second 39m working height Ragno TSJ 39/C tracked platform to Russia through its distributor in the country Vertex. Vertex received the first unit a few months ago where it is being used for window cleaning at the Europeisky shopping mall in Moscow. Meanwhile, Vertex, also took delivery of the first 11 machines of its total order of 58 machines from JLG.



TCA Lift Falcon Spider FS330Z at the Dubai Festival City Mall.

TCA Lift buyout

Generationskifte Invest, a Denmark-based private equity company, has acquired 65% of the shares of TCA Lift.

Three TCA Lift Falcon Spiders work at the Louis Vuitton building in Paris, France.

TCA Lift, also based in Denmark, manufactures the Falcon Spider range of tracked platforms and has its origins in E Falck Schmidt, the original company.

Finn Schlitterlau, CEO of TCA Lift said, "We have been looking for a partner who has capital and has helped develop companies by creating a renewed focus on increasing growth.

"Although TCA Lift has grown almost 100% since we took over the company in 2011, we also believe that the market is significantly larger. In addition, to strengthen our sales efforts, we will continue to invest in new lift developments that can solve our customer's needs."

Speaking of product development, Mr Schlitterlau adds, "It's very simple, the lower weight and the more compact

the aerial lift is, the more flexible the lift is. And these are the key performance aspects of the Falcon Spider." The range consists of 29 m to 52 m working height machines.

Thyge Mikkelsen CFO of TCA Lift continued, "The Falcon Spider lift, which was originally invented by the original owner in the late 1970s, was the first of its kind with so-called spider legs." He added that the company would continue to produce the Falcon range.

Jens Heimburger from Generationskifte Invest said "It is also crucial that Finn and Thyge continue both as leaders and co-owners." As a result Mr Schlitterlau and Mr Mikkelsen retain 35% of the company's share capital.

Generationskifte Invest is part of Dansk Generationskifte, which, since 2005, has specialised in small and medium-sized Danish companies. Following the transaction, Jens Heimburger, Enrico Krog Iversen, and Robert Spliid, from the company, have joined the TCA Lift board.

UNITED RENTALS TO ACQUIRE NEFF

As AI was going to press, United Rentals announced it is to acquire Neff Corporation for US\$1.3 billion.

The announcement was made shortly after H&E Equipment called off its proposed acquisition of Neff, which was pencilled in at around US\$1.2 billion.

H&E's CEO, John Engquist, said that the company would remain disciplined on the price H&E would pay for assets, meaning it would not compete with United's offer.

United – the largest rental company in the world, with 2016 revenues of US\$5.26 billion (4.48 billion) – will pay US\$25 (21.30) per share.

Neff has a presence in 14 US states and is headquartered in Miami. For the full year 2017, Neff is expected to generate revenues of US\$419 million. United said it had paid H&E a termination fee of around US\$13.2 million on behalf of Neff.

Michael Kneeland, president and CEO of United Rentals, said, "The acquisition of Neff is a significant opportunity for us to augment long-term returns for our investors, and build value for our customers and employees."



DIARY

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20-23 September, 2017
Beijing, China
www.e-bices.org

ICUEE 2017

3-5 October, 2017
Louisville, KY, USA
www.icuee.com

GIS 2017

(Italian Cranes & Access and Heavy Transport Show)
5-7 October, 2017
Piacenza, Italy
www.gisexpo.it

ALH Conference & Awards

12 October, 2017
Miami, FL, USA
www.khl.com/alh-ca

APEX Asia

31 October – 3 November 2017
Shanghai, China
www.apexasiashow.com

International Rental Conference (IRC)

31 October 2017
Shanghai, China
www.khl.com/irc

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■ **Podcast:** The latest audio Access World audio podcast covers recent industry news and views rounded up by *Access International* Editor Euan Youdale and *Access, Lift & Handlers* Editor Lindsey Anderson. Regular editions will follow during the year.

Oudenbroek leaves Holland Lift

Eline Oudenbroek has resigned from her position as managing director of Holland Lift.



is staying at the company and they have a perfect strategy for the future, and I know it will be fine."

Oudenbroek told AI she had greatly enjoyed working at Holland Lift and in the access industry but explained she had accomplished her main goal at the company.

"I make companies healthy and help them grow, I am not a long-term manager. I could have worked a little longer at Holland Lift but we had a different opinion about the next stage. So, someone else will bring the company to the next level."

She added, "Everyone else

In January 2013 Rotterdam-based ProDelta Investment Partners became majority shareholder of

Holland Lift having seen major growth potential at the company. Oudenbroek joined soon after in July. "I love the access industry," said Oudenbroek. "The business is still full of the original owners and pioneers."

Contractual obligations mean Oudenbroek will be unable to work directly in the access industry for a couple of years. ■

SKYJACK CLIMB CONTINUES

The Industrial division of Linamar, which is essentially made up of Skyjack, increased its product sales by 24.5% in the second quarter of 2017, or \$71 million, to \$361.1 million, compared to the same period in 2016.

The sales increase was due to strong market share gains in scissors in Europe and Asia, said the company in its financial statement, as well as significant market share increases in booms in North America, Europe and Asia. The company added there had been solid market growth in all three regions, along with favourable changes in exchange rates.



Telehandler sales were also on the up in the quarter, according to Linamar, with increased market share in North America for this product sector too.

Operating earnings increased \$1.3 million, or 2.5% over the second quarter in 2016 to \$54.1 million. This was predominantly driven by the increase in volumes, the favourable changes in foreign exchange rates. They were partially offset by a sizeable loss on the foreign exchange revaluation of the operating balances in the second quarter in comparison to a modest gain in the same period in 2016, said the company.

Changes in product mix, and launching products, along with increased management and sales costs to support growth, also impacted earnings. For the six months, ending 30 June, operating earnings were up from \$80.8 million in 2016, to \$99.9 million this year.

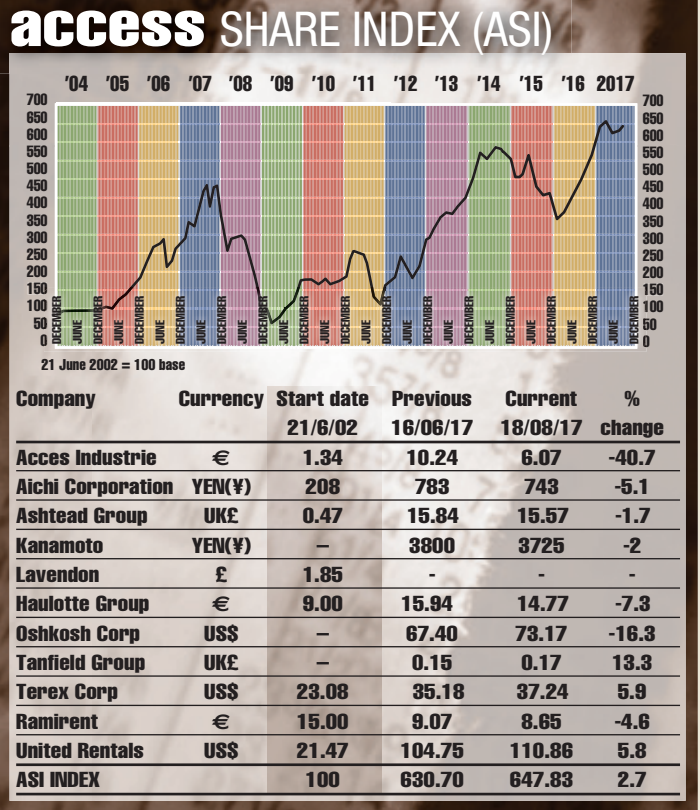
FINANCIAL HIGHLIGHTS

■ **Genie** experienced a flat second quarter of its financial year in terms of sales, with revenue of \$593 million, compared to 593.7 million in the same period last year. Operating income saw a greater drop, from \$72.5 million in its 2016 second quarter to \$60.8 million in 2017, representing 10.3% of net sales. For the half year, sales were down to \$1.065 billion from \$1.114 billion in first half of its 2016 results. Genie's operating income also took a knock over the first six months of the current financial year, down from \$111 million to \$83 million, or 7.7% of sales. AWP backlog grew 46% including growth in North America, Europe and Asia.

■ **JLG Industries** sales increased by 2.9% to \$980.2 million in the three months to 30 June, the third quarter of its fiscal year. Operating profit increased by 6.6% to \$130.2 million. Oshkosh Corp, JLG's owner, said the results were better than expected and reflected higher sales of aerial platforms offset in part by lower shipments of telehandlers. AWP sales rose by 14% to \$583.1 million for the three months, while telehandler revenues were 24% down at \$202.9 million. The results included a \$11.2 million charge for restructuring at the access division, acations which were previously announced.

■ **AVS System Lift** increased its revenue by 11% to €170.1 million in its 2016 financial year, compared to its 2015 financial year. Leopold Mayrhofer, CEO of System Lift, a Germany-based cooperative of AWP rental companies, attributed the success above all to quality of service. "Our customers can rely on the highest level of service and state-of-the-art equipment at all times. We ensure this with our regular and extensive quality audits." The System Lift partners invested €43.5 million in equipment in 2016, compared to €39.5 million in the previous year. This brought the number of aerial work platforms and forklifts in the combined fleet to 12600 units, plus 630 service vehicles.

■ Spanish rental company **GAM Alquiler** has announced half-year revenues of €53.5 million, representing a year-on-year increase of 5%. The company's revenues growth of 5% was an impressive result, given the company's fleet size is 6% smaller than at the same time last year. GAM's earnings before interest, taxes, depreciation and amortization (EBITDA) also grew 4% year-on-year, to €13.6 million – a margin of 25% of its revenues. GAM said that the diversification into new sectors such as industry, energy, events and training was a key factor in its growth.



■ Brazil-based **Mills Estruturas e Serviços de Engenharia** has endured mixed emotions in the second quarter of 2017, with rental revenues of R\$42.3 million (€11.53 million) – a 22.2% decrease year-on-year. However, compared with the first quarter of 2017, the companies rental revenues increased 3.7% from R\$40.8 million (€11.12 million), which signals the company's first sight of growth in over two years.



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Upping their game

Bigger is better. That's the view from the industry, which requires greater capacity and room for tools. The same is true for smaller scissors.

The large capacity scissor ascribes well to the general view that AWPS are getting bigger and more powerful, as are the products at the top end of manufacturers that do not yet produce truly high capacity or big deck scissors. Engine and noise pollution are also top of the list in the modern design process, as are the implications of the new standards in North America.

Firmly in the big category is JLG's recently unveiled 33m lift height 330LRT and 43ft 430LRT, at ConExpo during March, to complement its 53ft 530LRT and round out its family of large rough terrain (LRT) scissors.

Features of the JLG 2250 pound (1.02 tonne) platform capacity 330LRT and 430LRT include lower fuel consumption, a standard oscillating axle that gives better traction and grade climbing ability, and a standard optimised hydraulic system, as well as 45% gradeability across the series.

There are other important areas of development for big deck scissors, as seen in these recent launches. Rafael Nunez, product manager, scissor lifts at JLG Industries, explains, "Rigid and strong scissor stacks add stability and enhance operator confidence. The



PB S270-24E 4x4

Holland Lift HL-275
H25 4WD/P/N



large platform has a spacious deck, and a standard 4 ft deck extension, which provides more room for people and materials. The pneumatic tyres were replaced with foam filled tyres.

With these new machines three drive modes are also now available. With the platform lowered, the three position Speed Switch permits the operator to select either high speed (3.5mph – 5.6kph), mid-speed (2.0 mph – 3.21kph), or low speed (1.0mph – 1.61kph).

Nunez says customers want products that can operate in rough terrain environments. "For their business, it's extremely important to have machines that are reliable and easy-to-service; with parts and service readily accessible should they be required." The LRT series is extremely durable making them ideal for rental and on jobsites with rough terrain. They also feature a new, robust, easy-to-extend extension deck and all-steel hood.

A core focus for Genie, and indeed most of its competitors, is to truly understand the

needs of customers and the changes in the aerial market. As Genie rolls out products in response to global requirements, such as the new ANSI/CSA (North American) standards, says Michael Flanagan, Genie product manager, Terex AWP, it will continue to closely monitor how customers worldwide use these new machines in the quest for developing new models.

Standard effect

Genie's immediate updates to its big deck scissors is in response to new standards that effects the entire range, "With the upcoming changes to ANSI/CSA standards in North America, we have taken the opportunity to incorporate changes to nearly every model of Genie scissor lift."

These changes will include brand new features such as load sense systems, which we have had much success with in our boom lift products, as well as smaller alterations such as toe guards on platform entrances.

LARGE CAPACITY SCISSORS

IN THE FIELD

Dingli launched its most recent product towards the end of last year. The JCPT2223RT, with a 22m working height, has a 750kg capacity launched at Bauma China in November.

It includes a move to greater gradeability, higher ground clearance, and automatic extension deck, plus a stable structure for users.

“We use axle drive to replace the tradition hydraulic motor drive, and the scissor structure is much stronger,” says Harry Chen, Dingli sales director.

The fact is, he adds, bigger deck scissors are set to become more popular and says there are new machines being tested in the field.



“These changes are relevant to the new standards in North America but also standards set in other regions, such as EN280 in Europe,” says Flanagan.

Nevertheless, there are some advances specific to the big decks. “As the stowed dimensions and operational capabilities of slab and rough terrain scissors increase, the larger scissors are expected to accommodate higher payloads and additional occupants”.

SNORKEL LAUNCH

Snorkel is developing a new family of high capacity, feature rich, large deck scissor lifts that will range from 9.1m (30 ft) to above 18.3m (60 ft). The first model is expected to launch in early 2018, when product details will be announced. In line with most sectors of the market, there is increasing demand for aerial lifts with higher lifting capacities, confirms the manufacturer. Matthew Elvin, CEO of Snorkel, says, “While these scissor lifts are already designed to be high capacity, contractors continue to look for greater lift capabilities to help them boost productivity on the jobsite. There is also growing demand for aerial lifts which are hybrid or electric powered, including within this high capacity scissor lift sector. Driven heavily by emissions regulations, this demand also tends to peak and trough in line with changes in the cost of fuel.”



The idea is to up the capacity wherever the opportunity. Flanagan points out that many Genie slab scissors, including the GS-2032, GS-2046, GS-2646, and GS-3246 models, exceed the industry standard 500 pound capacity with up to 1200 pound capacity and up to four occupants. Similarly, the Genie GS-3384 RT and GS-3390 RT units enable operators to carry up to 2500 pounds with up to seven occupants.

“High capacity and high occupancy scissors enable end users to carry more personnel, tools and materials to their jobsite, to help them get their jobs done faster.”

Balanced design

Looking to the future Flanagan adds, “There is growing demand in the rental industry for tailored solutions, such as application-driven machines, options and attachments. Increasing demand for taller slab and rough terrain scissors must be balanced with the need to not only take an operator

up to height — but also additional personnel, tools and materials.

“It is critical that operators have solutions to manage items in the platform, including proper loading and securing of materials during operation.”

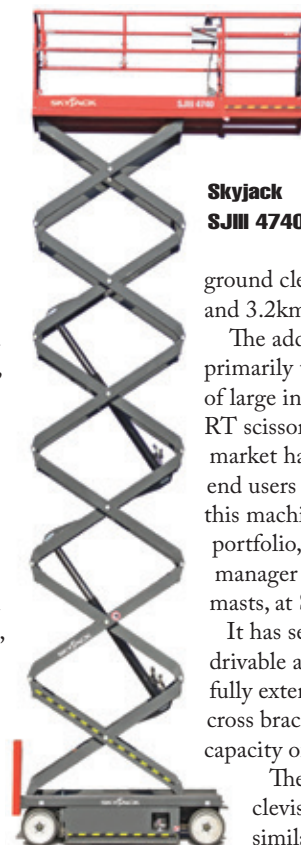
Skyjack’s newest and tallest DC electric scissor lift is the SJIII 4740, which was launched in the spring of 2016. It has a 13.8m work height, 90cm roll-out extension deck, 8.1cm raised ground clearance, 54 cm inside turning radius and 3.2km/h stowed speed.

The addition of the SJIII 4740 was made primarily to fit the needs of a niche market of large indoor commercial applications that RT scissors and booms cannot access. “This market has seen much more acceptance from end users in the last 18 months, and has made this machine a large part of Skyjack’s product portfolio,” says Kristopher Schmidt, product manager for DC/RT scissors and vertical masts, at Skyjack.

It has several operational benefits. It is drivable at full height with the roll-out deck fully extended, has 25% gradeability, welded cross bracing on its scissor stack and an overall capacity of 350kg.

The SJIII 4740 has also incorporated a clevis-style front wheel drive, engineered similarly to the 68xx RTs, along with newly designed single location emergency lowering and standard half-height gate.

Schmidt says, “In today’s market we’re seeing a push into hybrid technologies. The main driver of this is the need for machines to have access to both indoor and outdoor work that a dual fuel or diesel machine cannot access. The way that buildings are now being built has changed customers’ perceptions of these units. With walls now going up before foundations, the need for a low/zero emission



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LARGE CAPACITY SCISSORS



machine that can operate on dirt is looked at positively, and these machines can be first on/last off site with no downtime for swapping machines mid-construction.”

We’ve been working on new ANSI 92.20 compliant machines over the course of the last three years. This will be an entirely new scissor line and you’ll see changes in our machines for all international markets to coincide with the implementation of these standards.

Expanding range

The main features for Skyjack’s large rough terrain scissors are that they have axle-based 4WD, rear differential and front limited slip differential, dual extension decks for an increase in workspace and are drivable at full height (SJ8831 and SJ8841 RT models only).

Schmidt adds, “The construction industry is starting to see progression in the use of telematics and fleet management software, to ensure their machines are being utilised properly with less downtime, and to give the rental companies a better understanding of their overall cost of ownership.”

Thomas Meheust, ATN sales director, says its big scissor products are born as a result of a requirement for greater height and more environmentally-friendly power packs, namely hybrid.

The near future plan is to expand its current range to incorporate these features. They would build on the 12m working height CX 12, launched in 2012, with a 1100kg load capacity and drivable at full height, along with the CX 15, introduced in 2011, offering a 15m working height and a 700kg capacity. A feature is the 7.3m platform length with

extension, and “a platform as large as the chassis, for a better access to facade work.”

Meheust adds, “Rental companies are asking for better TCO - cheaper products or longer lasting products - as the rental market price for big scissors is low.

Holland Lift confirms the importance of environmental improvements. Its outgoing

HEIGHT AND WEIGHT

Imer is increasing its capacities. At the forthcoming GIS exhibition in early October, in Italy, the manufacturer will launch the fully renewed and designed IM xx180 series, which will offer a large range of power options, such as electric DC motor, diesel engine and bi-energy diesel and electric power unit.

It will also offer increased 13m and 15m working height, and capacities ranging from 500kg to 600kg, thanks to a newly designed undercarriage and scissor package, but also as much as 1.5m platform extension, thus very compact dimensions of 1.8m x 3.2m.

Imer’s latest high capacity scissors lift models, the IT 220 series were launched at Intermat 2015 but went through structural and assembling upgrade in 2016. The model 220 is available in two working heights and capacities. Both models could be diesel or electric motor DC powered: IT 14220 offers 800kg capacity at 16.5m working height, while the IT 17220 offers 540kg capacity at 19m working height. Both units can be driven at full height with full load even on the super-deck platform extension of 6.8m total length. “The market focuses more and more on ‘clean units’ aimed to reduce both pollution and noise on the job site. This provides human ambience, not related to purely to the construction site and has been one of the drivers of the development,” says the company. “Compact dimensions of the folded down MEWP are essential to operate in renovation or restructuring sectors. Carrying capacity is also key; units featuring more capacity will allow better utilisation ratio for the multiple requirements of the job site.”



managing director Eline Oudenbroek, who has now left the company, told *AI*, “In the near future we will not develop and engineer new models as we did that the last few years. At this moment we will be focusing on making our range more ecological.”

The HL-275 was the first Hybrid Eco scissor lift, launched in 2015. It has been equipped with the latest hybrid technology. “The great advantage of our hybrid scissor lifts is that they enable the customer to complete the entire project using a single machine.”

“The market asked for a scissor lift with less emission due to the stricter legislation and environmental requests,” says Oudenbroek. Interestingly, as an aside, Oudenbroek adds,



LARGE CAPACITY SCISSORS

“The market also was looking for a small scissor lift with a great height which can be used for warehouses.

“Warehouses are of great influence in the evolution of high and ecological systems.”

The HL-330 E14, also launched in 2015 is the manufacturer's solution for narrow workplaces. The machine is just 1.4m wide and has a working height of 33m – the first narrow scissor to reach that height.

PB Lift's latest high capacity model was the PB S270-24E or D 4x4 with 1000 kg platform capacity – either battery powered or as a diesel version, launched mid-2015.

Big lifts

In 2017 the company will be launching new models with either 27.5m or 32m working height, also with big lift capacities. Both heights will be produced in a Top 14 version with 1.4m width and a Top 24 with a width of 2.4m. All units will be drivable at full height, with four wheel drive and four wheel steering. The Top 14 will be battery powered and the Top 24 will be available in both battery and a diesel version.

Daniel Yassini, marketing and sales at PB, says, “Machines are getting continuously more and more working height and lift capacities. These new machines can be used both indoor and outdoor, have over 27 m working height and can be driven at full height.” Enough space and power for up to four workers, materials and tools is also a feature.

“Situations have changed, for example in power plants, at warehouses or construction sites,” says Yassini, “Everything is getting bigger and larger. So, you need more people to work at the same time with more reserves of lift capacities for tools and stuff.”

AI

CUSTOM TUNNELLING

The MEC 3392 RT-T scissor lift was introduced in 2015 and was developed from close co-operation with specialty rental for tunnelling applications – hence the 3392 RT-T designation. It has a 2650 pound (1200kg) rated platform capacity double deck for up to five persons and a platform height of 33ft (10m) and overall width of 92 inches (2.34m). The platform is 24.75 Ft (7.5m) long with both decks extended.

Specifications critical to productivity in tunnel applications are a 6.2 m/ph (10 km/h) stowed travel speeds, being 50% faster, to cover long driving distances quicker. Then there is the rated capacity, representing a 32% increase, to carry more equipment and complete more work per journey.

Rated slope operation was also much higher.

The machine can drive at height on sloped surfaces, saving the time spent on outrigger deployment and retraction between elevated work tasks. Examples are:

“The experience gained through development and field feedback of the 3392RT-T has led to development of a version of the MEC Speed Level 2684 RT-T which has similar increases in productivity in all the same areas. The Speed Level 2684 RT-T can work on slopes up to 14° (25%).

The manufacturer will launch an Aviation Titan in the near future that provides a means of lifting very heavy loads, including APU Jet engines, into and out of the rear of aircraft while workers are using fall arrest harnesses from a fully guardrail protected platform. The machine will also allow two person ‘wing walking’ while having a platform capacity up to 4000 pounds (1815 kg).

This machine is in stark contrast to MEC's relatively recent move into higher production slab scissors, which it has been launching at trade shows across the US. See the interview in the June/July issue of AI.



	PLATFORM HEIGHT			
	4m	6m	8m	10m
Rated Tilt Angle side-to-side	8°	6°	5°	4°
Rated Tilt Angle fore and aft	10°	8°	6°	5°
Maximum Elevated Drive Speed	5.0kmh	4.0kmh	3.0kmh	2.0kmh

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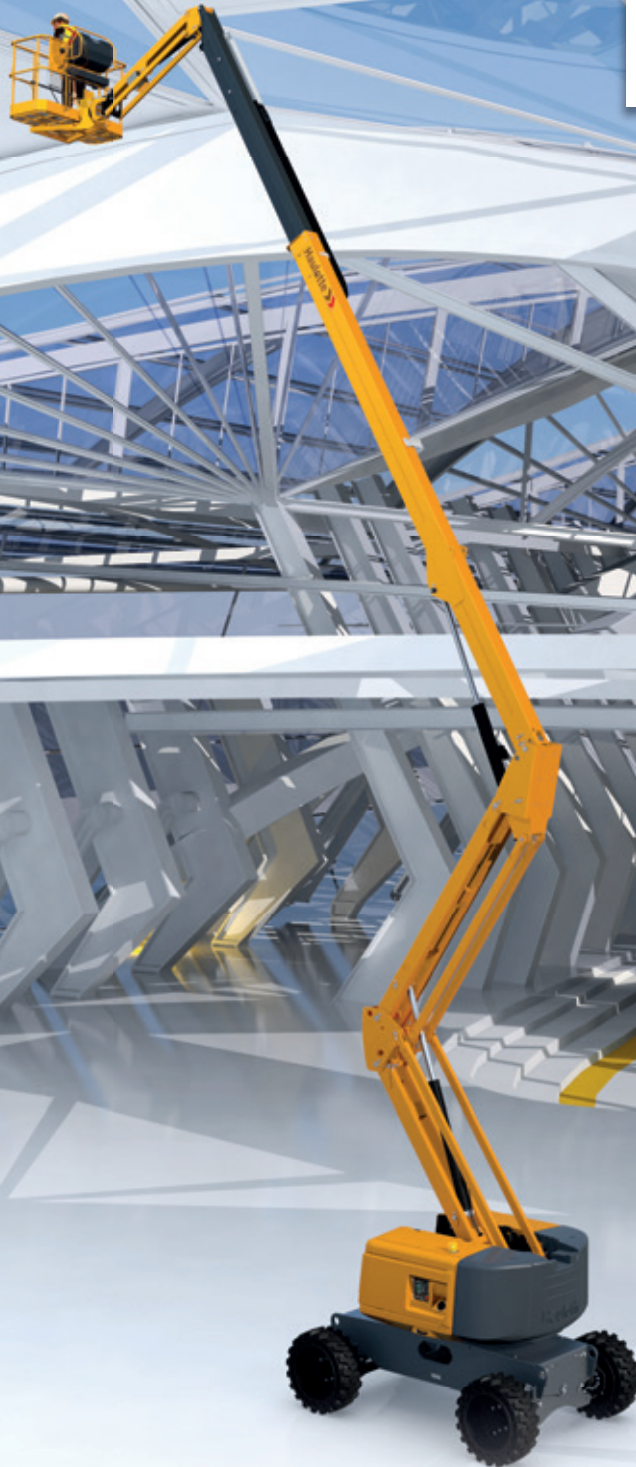


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India advances

Steel producers in India are utilising aerial work platforms in a big way as they discover their numerous benefits for regular plant maintenance.

Partha Pratim Basistha **reports.**

India's major state and private steel producers are rapidly migrating from their traditional, rudimentary plant maintenance practices to more advanced ones as they become bigger on the backdrop of major capacity additions undertaken in recent years. These advanced maintenance practices feature higher levels of mechanisation, including powered access. Major reasons for using the platforms is greater safety and faster maintenance, resulting in higher levels of plant availability.

Tata Steel is one of the major producers in India that is adopting AWP's extensively. It is employing them for maintenance of its flagship, 100-year-old, 10 million tonne fully integrated Jamshedpur steel plant, located in mineral rich state of Jharkhand in Eastern India. The steel producing behemoth has also deployed a fair number of AWP's to carry out regular maintenance at its newly-commissioned plant in Kalinganagar in Odisha, Eastern India. It has a capacity of

three million tonnes and was commissioned in 2016.

Before 2009, maintenance at the Jamshedpur facility was carried out using traditional bamboo and conventional steel scaffolding for major and minor repairs. It was decided to move to mechanised practices, as maintenance personnel discovered that setting up scaffolding took more time. Moreover, many constricted, critical areas of the plants could not be accessed as scaffolding required a larger space.

Speaking to *Access International*, Sankar Biswas, chief of central maintenance (mechanical) at Tata Steel says, "We found in many cases while working at height, maintenance workers are making substandard working platforms or avoid making any platform at all to execute the jobs. This is primarily because of two reasons. Firstly, in many cases for doing a half hour job they need to spend hours in making a scaffolding platform. Secondly, on many occasions, due to non-availability of suitable materials for the access platforms, workers altogether avoided constructing platforms. This used to result in the construction of improper approaches for working at greater heights. Due to this, we had many fatal accidents. To address these issues, we began introducing powered access for plant maintenance jobs from 2011 onwards. We now utilise scaffolding for undertaking maintenance only when required."

Regular maintenance

Both the Jamshedpur and Kalinganagar plants are utilising powered access platforms for maintenance to wiring, pipe lines - including pipe replacement, blast furnace, steel melting, sinter plant and hot strip mill equipment. The platforms are also extensively used for chimney cleaning, painting and general maintenance jobs.

"Powered access platforms are utilised by us for maintenance performed above 2m. Primarily, we use powered access machines where not more than two maintenance crews are required at a time, job duration is short, there is requirement for working at higher

Routine plant maintenance at Jamshedpur



Major pipeline maintenance carried out by United Express at the Jamshedpur plant.

height and overall when we find it difficult to build scaffolding at the job area." Says Mr Biswas. Tata Steel is utilising 40, 45, 60, 80, 85, 120 and 150 ft articulated and telescopic boom lifts.

While AWP's are being used by Tata Steel for carrying regular maintenance, there are also certain very specific maintenance requirements. "The Jamshedpur plant generates close to 10 million tonnes of dust during the process of steel production. This gets accumulated on the roof of the plants, requiring regular cleaning by placing people on AWP's," says Mr Kishan Sonthalia, partner, United Air Express, a major, Jamshedpur based, AWP, construction and mining equipment rental company with specialisation in steel plants operation and industrial housekeeping.

United Air Express rented nine new JLG AWP's to the Jamshedpur facility for the maintenance work. They include a 34ft working height 1340 boom lift, a 45ft 450





Maintenance at night

boom, two 60ft 600 AJ booms, two 80ft 800 AJ booms, one 125ft 1250 AJT boom and one 150ft 1500 AJS boom. It has also rented out a JLG scissor lift. They were acquired for three to four years by rental company United Air Express, to which Tata Steel has outsourced operations of its blast furnace at the Jamshedpur plant.

Rising orders

Encouraged by the wide benefits of AWP's for quicker response times and carrying out emergency maintenance jobs, subcontractors and maintenance companies working for Tata Steel's plant maintenance have been procuring large numbers of units over the years. The plants have also been buying equipment of their own. The AWP's are both diesel- and battery-driven for external and internal maintenance tasks.

Tata steel procured articulated and telescopic boom lifts between 45-80 ft in the recent past from Genie. The boom lifts are being used for pipeline and for other maintenance purposes. The plant's own Z-80/60, 80 ft unit is used for 400 kVA switch yard maintenance. JK Surface Coating, subcontractors for Tata Steel carrying out coating and painting jobs at the Jamshedpur facility acquired two Z-45/25 and 40 others from Genie, few years back.

"Based on higher levels of reliability delivered by the equipment and quick response time, the steel major procured eight battery-operated, Terex Genie, GS 2032 scissor lifts in 2014 for Jamshedpur and four units for their Kalinganagar project for battery maintenance. For the Kalinganagar facility, it also acquired 30 ft, push pull AWP's for indoor jobs involving electrical maintenance,



Pipeline maintenance at Jamshedpur.



Pipeline maintenance

stacker applications." Says Raja Ghosh, senior manager, business development, Maco Corporation (India), distributors for Genie in India.

He continues, "Based on the large success of the equipment at Tata Steel, another major private steel producer Jindal Steel recently brought four GS 5390 RT scissor lifts for maintenance of its steel plant in Angul Odisha. State owned, Steel Authority of India's Rourkela plant in Eastern India has also brought one brand new TZ-50 trailer mounted boom for switch yard, pipeline and coke oven battery maintenance. Recently Tata Steel's Hooghly Metcoke facility (HMC) in West Bengal bought a 150ft Genie SX-150 for coal tower maintenance along with one Z80/60 articulating boom."

Safety requirements

Tata Steel and other steel producers hiring the AWP's from rental companies have put stringent safety regulations for the equipment.

According to Mr Biswas, "There are lots of safety features built in to powered access platforms, none of these are to be by passed and they must be certified by the OEM.

"Machine life should not be more than 10-12 years as structural integrity is questionable after that, unless the machine is completely revamped and recertified by OEM. Quick retraction of the extended boom must be in place to bring back the maintenance crew to ground level in case of emergency. Service providers should have annual maintenance contracts with authorised OEM dealers. Furthermore, it is mandatory that rental agencies should have certified operators to run the machine at our plants."

For OEMs supplying the machines, the private and state-owned steel plants stress that equipment needs to have guard rails to prevent infringement. Plus, the equipment, specifically boom lifts, need to have foam filled or solid non-marking tyres, back camera and sound alarm.

The author of this feature also contributed an indepth article about India for the November-December issue of *AI*.

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Buying and booming

It's been a dramatic year for the access50, thanks to a raft of acquisitions and a strong showing in the sector overall.

access 50 RENTAL FLEETS

We have what could be described as a meteoric rise in the top five entries in this year's **access50** listing of the world's biggest access equipment rental companies, measured by fleet size. When added together their total fleet size comes to an impressive 291170, reflecting a 31% rise on the top five last year. There is one good reason for this - acquisitions.

While United Rentals completed its buyout of NES Rentals in April, lifting its fleet size by around 20000, another big leap this year was performed by Loxam, following its acquisition of Lavendon Group and Hune. Lavendon had a similar fleet size to NES of just over 21000, and generalist Hune had 5100 units, (as shown in last year's **access50**).

These investments brought Loxam into the top five in the table this year at number three, up from 12th position last year. Then, in July, TVH Group announced it had acquired German access rental business Gardemann. Loxam sold Gardemann a matter of months after acquiring it as part of its takeover of Lavendon Group earlier this year, and one that it contested with TVH Group in a bidding battle at the end of last year.

The deal means TVH will own the two

largest access rental businesses in Germany, adding Gardemann to the Mateco business that it acquired in 2012. The combined fleet of the two operations will be approaching 10000 units, with the 3500 machines owned by Gardemann. It helps bring TVH into the top 10 this year, at seventh place.

Of course, we must not underplay the importance of NES Rental's sales to United. NES was in sixth position last year, just two places behind Lavendon. They represented the world's two biggest access specialists, both of which have been bought by generalist equipment companies. It changes the global access rental landscape significantly, as well as making the top five of the **access50** look quite different too - without any specialists in it.

Upward trend

Indeed, the same is true until we reach Riwal in 14th position, which we will expand on later. Just ahead of Riwal in 9th place is US-based generalist H&E Equipment Services. Its recent history is just as enthralling as the top five players, and involves one of them.

In July it too announced it was on the acquisition trail with its plans to buy Neff Corp, until August when Neff said it had

TOP 50 FLEET SIZES

	2017	% change	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006
Top 5	291170	31	222165	214325	220192	204624	196656	165556	164237	173792	189850	179880	151178
Top 10	523157	22	428443	298383	295334	271576	265888	240113	238181	254424	270510	251700	207758
Top 50	645461	12	577377	527514	523767	481490	460758	434358	424853	449250	446956	402900	332700

2017	COMPANY	AWP FLEET 2017	2016	%	TELEHANDLER FLEET 2017	2016	%	FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
1	United Rentals (includes NES Rentals)	122708	98608	24.4	22481	19266	16.7	S, B, T, H	960	USA, Canada,	USA
2	Sunbelt	76500	62500	22.4	14400	12400	16.1	S,B, M, H	440	USA	USA
3	Loxam Group (includes Hune Group & Lanvendon Group)	44232	16330	171	4100	4500	-8.9	S,B,T,M	730	Europe, Middle East, South America	France, UK
4	HERC (Hertz Equipment Rental Co) (est)	25333	24127	5	5203	4956	5	S, B	280	US, Canada, China, Saudi Arabia, UK	USA
5	Nikken Corp	22397	20600	8.7	0	0	0	S, B, T	241	Japan, USA, Southeast Asia, UAE	Japan
6	Ahern Rentals	22071	18868	17	5710	2764	106.6	S,B	87	USA	USA
7	TVH Group (includes Gardemann)	20667	16515	25.1	865	990	-12.6	S,B,T	118	Europe, Malaysia, Mexico	Belgium
8	Nishio Rent All (includes Skyreach Group)	20491	17975	14	133	75	77.3	S,B,T,M	386	Japan, Singapore, Southeast Asia, Australia	Japan
9	H&E Equipment Services	19320	18161	6.4	2607	2460	6	S,B,T,H,M	65	USA	USA
10	Sunstate Equipment Co LLC	18200	17300	5.2	3700	3500	5.7	S,B	61	USA	USA
11	Aktio Corp (est)	18001	16823 (est)	7	0	0	0	S,B,T	650	Japan, Taiwan, Banglades, South East Asia	Japan
12	Blue Line Rental	15870	15657	1.4	3360	3384	-0.7	S,B	135	USA, Canada	USA

TOP 20 TELEHANDLER FLEETS

COMPANY	FLEET SIZE 2017	FLEET SIZE 2016	CHANGE %
1 United Rentals (Including NES Rentals)	22481	19266	16.7
2 Sunbelt	14400	12400	16.1
3 Ahern Rentals	5710	2764	106.6
4 HERC (Hertz Equipment Rental Co) (est)	5203	4956	5
5 Loxam Group (Including Hune Group & Lanvendon Group)	4100	4500	-8.9
6 Sunstate Equipment Co LLC	3700	3500	5.7
7 Blue Line Rental	3360	3384	-0.7
8 Kiloutou	2700	2400	12.5
9 H&E Equipment Services	2607	2460	6
10 A-Plant	1700	1700	0
11 NEFF Corp	1656	1600	3.5
12 SystemLift	1130	1200	-5.8
13 Acces Industrie	1100	1000	10
14 Salti	1079	806	33.9
15 PartnerLift	1004	988	1.6
16 TVH Group (Including Gardemann)	865	990	14.5
17 Collé Rental & Sales	852	851	0.1
18 Riwal	837	719	16.4
19 Coates Hire (Including Force Access) (est)	605	580	4.3
20 Boels Rental	600	600	0

received a superior offer from an undisclosed bidder. Neff also said it was still committed to the H&E negotiations, but a day later H&E reported it had decided to step away from the contest and said it did not plan to submit a revised offer.

Within hours, and just before this issue of *Access International* went to press, Neff's new owner was revealed as United Rentals.

Neff's fleet has not been combined with United Rentals' in this listing, in case there were any new developments in the story and because the added figure would not make a substantial difference to United's position in the table.

Returning to the subject of Riwal, it is now the world's biggest truly specialist aerial work platform and telehandler company. It has had a good year too with a 9% growth in fleet size, and in April this year, the Netherlands-based company acquired German renter AFI GmbH, which had a fleet of 1300 aerial work platforms, telehandlers and forklifts from nine

2017	COMPANY	AWP FLEET			TELEHANDLER FLEET			FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
		2017	2016	%	2017	2016	%				
13 ¹⁵	Cramo	14278	13455	6.1	488	385	26.8	S,B,T,M,H	312	Europe, inc. eastern Europe & Russia	Finland
14 ¹⁶	Riwal	13934	12788	9	837	719	16.4	S,B,T,M	69	Europe, Middle East, India, Kazakhstan	Netherlands
15 ²⁷	AJ Networks	13150	6000	119.2	0	0	0	S,B	57	Korea, Japan, Vietnam, Saudi Arabia	South Korea
16 ¹⁸	SystemLift	12363	11000	12.4	1130	1200	-5.8	S,B,T,M,H	77	Germany, Austria, Switzerland	Germany
17 ¹⁷	Ramirent	11200	11186 (est)	0.1	500	480	4.2	S,B,M,T,H	40	Slovakia, Ukraine, Russia	Sweden
18 ¹⁹	Kiloutou	11200	10500	6.7	2700	2400	12.5	S,B,T,M	485	France, Germany, Poland, Spain	France
19 ²⁰	Coates Hire (est) (includes Force Access)	10970	10450 (est)	5	605	580	4.3	S,B,T	245	Australia, UK, Indonesia	Australia
20 ²¹	Kanamoto (est)	10272	9600 (est)	7	30	30	0	S,B,T,M	180	Japan	Japan
21 ²²	PartnerLift	9363	9085	3.1	1004	988	1.6	S,B,T	154	Europe	Germany
22 ²⁴	Boels Rental	9294	8100	14.7	600	600	0	S,B,T,M	350	Europe	Netherlands
23 ²³	HSS Hire Group (includes UK Platforms)	9040	9038	0	49	49	0	S,B	292	UK, Ireland	UK
24 ²⁸	AFI-Uplift (includes Kimberly Group)	7132	5788	23.2	87	94	-7.4	S,B,T	35	UK, Middle East	UK
25 ²⁵	Mills Estruturas e Srvicos de Engenharia	6834	6213	10	263	292	-10	S,B,M	41	Brazil	Brazil
26 ²⁶	Pekkaniska	6000	6000	0	0	9	-100	S,B	27	Finland, Russia, Ukraine	Finland
27 ³⁸	Shanghai Horizon Equipment & Engineering Co.	5027	3100	62.2	0	0	0	S,B	23	China	China
28 ³³	Acces Industrie	4400	4000	10	1100	1000	10	S,B,T,M	30	France, Morocco	France
29 ³⁰	GAM	4330	4610	-6.1	0	0	0	S,B,T,M,H	100	Europe, North Africa, Middle East, South America	Spain
30 ³⁵	Modern (International) Access & Scaffolding	4220	3800	11.1	10	10	0	S,B	3	Hong Kong, Macau, Singapore	Hong Kong
31 ³¹	Gerken	4200	4200	0	441	441	0	S,B,T	15	Europe	Germany
32 ³⁴	Salti	4149	3911	6.1	1079	806	33.9	S,B,T,M	34	France	France
33 ³⁶	Collé Rental & Sales	3926	3487	12.6	852	851	0.1	S,B,T,M	14	Benelux, Germany	Netherlands
34 ³⁹	Solaris Brazil	3500	3073	13.9	140	166	-15.7	S,B	21	Brazil	Brazil
35 ⁴¹	A-Plant	3500	2950	18.6	1700	1700	0	S,B	135	UK	UK
36 ³⁷	Gruppo Venpa3 (GV3)	3400	3278	3.7	500	479	4.4	S,B,T,M	28	Italy, Europe	Italy
37 ⁴⁰	Galmon	3000	3000	0	0	0	0	S,B	1	Singapore	Singapore
38 ⁴²	Kranpunkten	2961	2880	2.8	55	85	-35.3	S,B,T, M,H	7	Sweden	Sweden
39 ⁴³	NEFF Corp	2859	2672	7	1656	1600	3.5	S,B	69	USA	USA
40 ⁴⁵	Aver Asia	2816	2532	11.2	36	32	12.5	S,B	10	Singapore, Malaysia, Indonesia, Myanmar	Singapore
41 ⁴⁴	Height for Hire	2615	2560	2.1	0	0	8	S,B,T,H	28	UK, Ireland, Slovakia, Hungary	Ireland

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Norty Turner, Riwal's CEO, commented, "The acquisition of AFI GmbH allows Riwal to strengthen its position in Germany, one of the largest access equipment rental markets in Europe."

Bucking the generalist trend too is UK-based AFI Group with its acquisition of Kimberly Rentals Group in July and its fleet of around 1500 units. In 2016, AFI also increased its business thanks to organic growth, with the opening of new depots in the Middle East, and through the acquisition of Rapid Platforms in October 2016. Combined, this lifted AFI's fleet by 23% over last year.

On the subject of organic growth, an impressive year has also been experienced by AJ Networks, based in South Korea, in 15th position. It has seen an incredible leap in fleet size of more than 100%, which the company

has confirmed, saying it reflects its major growth plans in the region.

Strong potential

Asia, in general, it seems has almost unlimited potential for growth. Shanghai Horizon, China's biggest rental company has greatly expanded its fleet again over the last 12 months by more than 60% to just over 5000 units. There are also plenty more rental companies in China that are getting close and starting to exceed the 1000 unit mark. Another is Fenghe Rental, based in China and new to the list this year, with a fleet of 2350.

It has been a busy year in the rental sector, following on from a number of acquisitions in the previous year, which are documented in the 2016 **access50**.

It has also been a successful year for the list overall, with healthy growth throughout and

LARGEST % GROWTH

COMPANY	PERCENTAGE GROWTH
Loxam Group (includes Hune Group & Lanvendon Group)	171.0%
AJ Networks	119.2%
Shanghai Horizon Equipment & Engineering Co.	62.2%
Alfasi Hire	36.7%
Rent Rise	26.6%
TVH Group (includes Gardemann)	25.1%
United Rentals (includes NES Rentals)	24.4%
AFI-Uplift (includes Kimberly Group)	23.2%
Sunbelt	22.4%
A-Plant	18.6%
Ahern Rentals	17.0%
Boels Rental	14.7%
Goscor Access Equipment	14.7%
Nishio Rent All (includes Skyreach Group)	14.0%
Collé Rental & Sales	12.6%

Not including estimated entries

2017	COMPANY	AWP FLEET		%	TELEHANDLER FLEET		%	FLEET	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
		2017	2016		2017	2016		(see key)			
42	⁵⁰ Alfasi Hire	2460	1800	36.7	60	50	20	S,B	4	Australia	Australia
43	⁴⁹ Brand Energy & Infrastructure Services (formerly Harsco Infrastructure)	2400	2300 (est)	4.3	0	0	0	S,B,M	50	France, Holland, UK	USA
44	⁴⁶ Prangi Gesellschaft	2350	2403	-2.2	303	295	2.7	S,B,T	16	Austria, Europe	Austria
45	^{NEW} Fenghe Rental	2350	NA	NA	0	NA	NA	S,B	12	China	China
46	⁴⁷ Nacanco	2300	2300	0	230	230	0	S,B,T	15	Italy	Italy
47	⁶⁵ Maquinza	2108	712 (est)	196.1	208	225	-7.6	S,B,M	17	Spain, Columbia	Spain
48	⁴⁸ All Erection (All-Aerials)	2100	2300	-8.7	350	525	-33.3	S,B	35	North America, inc. Mexico	USA
49	⁵¹ Location d'outils Simplex	1870	1781	5	114	109	4.6	S,B	35	Canada	Canada
50	^{NEW} Chicardo Investment	1800	NA	NA	2	NA	NA	S,B	2	Hong Kong, Macau	Hong Kong
51	⁵³ Voisin's Equipment Rental (est)	1680	1600 (est)	5	87	82	6.1	S,B	1	Canada	Canada
52	^{NEW} High Reach	1525	NA	NA	426	NA	NA	S,B	5	USA	USA
53	⁵⁵ GT Access	1500	1417	5.9	0	0	0	S,B,T	5	UK	UK
54	⁵⁶ Tayeou Kao Kong Enterprise (est)	1500	1400	7.1	0	0	0	S,B	6	Taiwan	China
55	⁵⁴ AGF Access	1450	1470 (est)	-1.4	8	10	-20	S, B	8	Canada, USA	Canada
56	^{NEW} Estaf Equipamentos	1349	NA	NA	0	NA	0	S,B	9	Brazil	Brazil

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a real indication that there is a global boom in the access equipment sector. Of course, major acquisitions bump up the figures at the top of the table and allow smaller companies to move up; that aside the industry is in a dynamic and exciting phase, a fact made clear in this year's **access50**.

Not to forget telehandlers, which are a complementary item for aerial work platforms, the **access50** also includes the fleet sizes of this product type, shown separately in the main listing. It seems the overall fortunes of

telehandlers were not as impressive as their AWP counterparts this year. Nevertheless, they remain a stable and strong part of the companies that offer aerial work platforms for rental. See also the break-out table on page 23, showing the top 20 telehandler fleet sizes of those companies in the **access50**.

It will be interesting to see how the rental sector fares over the next 12 months; perhaps there will be just as much to talk about this time next year. Keep an eye on www.khl.com/ai for all the breaking news as it happens. **AI**

THE SURVEY

This survey was carried out via an e-mail and e-cast campaign in the two months leading up to the publication of this list. Companies with AWP fleet sizes above 500 units were asked to provide quantities of each platform type in their fleet, along with the other details shown in this listing. This year, for the third time, we have also shown the number of telehandlers in each company's fleet. Where figures have not been available we have made an estimate.

2017	COMPANY	AWP FLEET		%	TELEHANDLER FLEET		%	FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
		2017	2016		2017	2016					
57 ^{NEW}	Fortrent	1225	NA	NA	80	NA	NA	S,B,M,H	19	Russia, Ukraine	Russia
58 ⁵⁸	Alo Rental	1202	1188	1.2	71	65	9.2	S,B,T	13	Chile, Peru, Panama, Argentina	Chile
59 ⁶⁰	Rom Israel	1200	1000	20	7	0	-	S,B	2	Israel	Israel
60 ⁵⁹	Arentis (est)	1100	1034 (est)	6.4	100	90	11.1	S,B,T	3	Netherlands, Belgium, Luxemborg, France, Germany	Netherlands
61 ^{NEW}	Lifterz	1083	NA	NA	0	NA	NA	S,B	3	UK	UK
62 ⁵⁷	Instant Access (est)	1070	1350	-20.7	0	0	0	S,B,M	8	Australia, New Zealand	Australia
63 ⁶³	LH Construction and Machinery Leasing	928	767	20.9	155	146	6.2	S,B,T	4	Singapore	Singapore
64 ⁶⁶	Rent Rise	891	704	26.6	3	4	-25	S,B,M,H	5	Turkey, Georgia, Azerbaijan, Turkhmenisthan, Iraq	Turkey
65 ⁶⁴	Goscor Access Equipment	867	756	14.7	49	36	36.1	S,B	7	South Africa, Namibia, Botswana, Mozambique	South Africa
66 ⁶²	Alimak Group	740	800	-7.5	0	0	0	M,H	9	Australia, Germany, Benelux & France	Sweden
67 ^{NEW}	Faith Vinc	739	NA	NA	2	NA	NA	S,B,T	6	Turkey	Turkey
68 ⁶⁷	Advanced Access Platforms (est)	700	695 (est)	0.7	0	0	0	S,B	2	UK	UK
69 ⁶⁹	Belaruslift (est)	690	659 (est)	4.7	30	27	11.1	S,B,T,M,H	6	Belarus, Russia, Poland	Belarus
70 ⁷⁰	WS-Skyworker	587	617	-4.9	30	35	-14.3	S,B,T	7	Switzerland	Switzerland
71 ⁷¹	Maltech (est)	570	570 (est)	0	30	NA	NA	S,B,T	27	Switzerland	switzerland
72 ^{NA}	Adastra Access	550	NA	NA	0	0	0	M	2	UK	UK
73 ^{NEW}	Mtandt Rentals	526	NA	NA	3	0	NA	S,B,T,M,H	5	India, Srilanka, UAE	India
74 ⁷¹	Manlift	520	510	1.9	6	6	0	S,B,T	2	Ireland, UK, Poland	Ireland

(est) – estimated NA – not applicable

Fleet details key: S – scissors B – Booms T – truck mounts M – mast climbers H – passenger hoists



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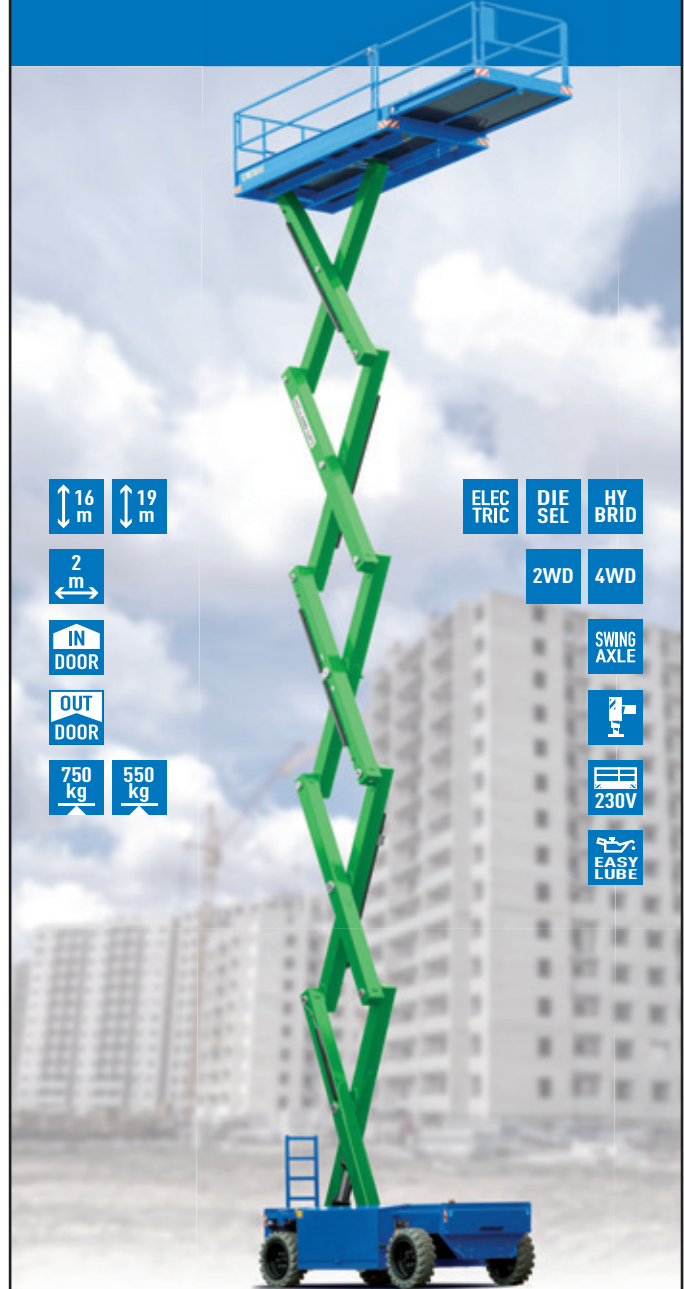
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Holland Lift presents its new smart models: HL-160 and HL-190. The concept is designed for tailored efficiency. A modular system with various options: 16 or 19m high, electric, diesel or hybrid; the base of the machine always remains the same. These scissor lifts have attractive exploitation costs and a high return on investment. And whatever configuration you choose, Holland Lift quality, safety and durability are as always part of the deal.



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Asia first

China's largest aerial platform manufacturers will line-up alongside the access market's big international players at APEX Asia, the first dedicated aerial platform exhibition to be held in Shanghai, China.

SHOW DETAILS

WHEN:

31 October - 3 November 2017.

WHERE:

The Shanghai New International Expo Centre (SNIEC), Shanghai, China.

Hall N1 (co-located with CeMAT ASIA)

www.apexasiashow.com

NEW FROM LIUGONG

Along with other generalist Chinese construction equipment manufacturers XCMG, LGMG and Sany, Liugong has launched its access division in the last 18 months and will have two product launches at APEX Asia. They include the PSA210AS tracked hybrid platform, with 21m working height, 19m outreach and a 200kg platform capacity. Its total weight is 3000kg. The second new product on its stand is the 19.8m working height PTA200C truck mount, with an 8.9m outreach, using its combined and telescopic boom. Maximum platform capacity is 230kg, while outrigger width is 2.88m and GVW is 5750kg.



The 10m working height GTTZ10EJ vertical mast from Sinoboom.

"APEX is an established and well-liked show on the access industry calendar, but with the Chinese and Asian market developing fast it is clear that this region would benefit from a local show dedicated to access equipment", said Tony Kenter, managing director of IPI.

Product launches

Well-known Chinese manufacturers will be using the show as a launchpad for new products. One of them Sinoboom is set to launch three new products at APEX Asia, one of which represents the China-based manufacturer's entry into a new product

category.

The 10m working height GTTZ10EJ vertical mast is the first of its kind in Sinoboom's line-up and features an automatic pot hole protection system, zero tailswing, small turning radius, 345° rotation and a horizontal reach of 3.3m.

The model is designed to be strong and compact, allowing it to enter narrow doors and elevator shafts, for example. An emergency lowering system is also included, as well as forklift slots.

Another launch is the 12m working height GTJZ electric scissor lift, boasting a new chassis design to create a more solid, sturdy performance. There are protruding steps to prevent surface paint rub and upgrades to maintenance accessibility and overall machine performance. This includes a longer run-time.

Sinoboom's third debut will be the 16m platform height GTZZ16EJ electric articulating boom. It includes a platform capacity of 230kg, with a maximum horizontal reach of 9.37m and a working height of 17.8m. The unit has a top speed of 5.2km/h and 40% gradeability, with a disc brake system to reduce slide.

Lesser internationally known manufacturers will also be in the mix at APEX Asia, though they have a common goal to the likes of Sinoboom, that being international expansion. An example is Xuzhou Handler Special Vehicle Co., which will show two products at APEX Asia.

They will include a new 7.5m working

APEX Asia runs alongside the well-established CeMAT Asia material handling and factory automation show, which attracts more than 75,000 visitors - visitors can move freely between the two shows.

Chinese access equipment suppliers at APEX Asia include Dingli, Mantall, Sinoboom, XCMG, Runshare and Liugong. They will join major western OEMs such as JLG Industries, Haulotte, Skyjack and Snorkel. Other exhibitors include Airo, TVH, Skyclimber, MCS and PG Trionic.

China and Asia are among the fastest growing aerial platform markets in the world and APEX Asia will be a showcase for manufacturers and dealers to promote modern access equipment to buyers and users across the entire continent. Make sure you see the full APEX Asia showguide in the October issue of *Access International*.

The shows will also benefit from the International Rental Conference (IRC), which will be held in the same Hall N1 as APEX Asia on the first day of the show. IRC attracts senior executives and equipment buyers from many of the world's largest equipment rental companies.

APEX Asia is organised by KHL Group and B.V. Industrial Promotions International (IPI), in cooperation with Deutsche Messe AG, which organises CeMAT Asia. The show is supported by *Access International* and the International Powered Access Federation (IPAF).

Handler's 7.5m working height pick-up mounted platform.



height pick-up mounted platform and an existing 45m working height truck mounted model.

The pair of platforms represent the highest and lowest products in the China-based vehicle mount manufacturer's range and demonstrates the wide range of aerial work platform producers in the country. Estimates put the number of AWP manufacturers in China at more than 100, a large number of which will be at APEX Asia and are focused on export across Asia and further afield.

Mounted on a crew cab, the 7.5m model is compact and has a low centre of gravity for overhead work with limited space around the vehicle. It offers 3.55m outreach. The 45m rear-mounted insulated hybrid platform is equipped with sophisticated safety features and range of sensors. See both products at Handler's APEX Asia stand (F1.2).

The big, established global names in the industry will be sharing the show area with their China-based counterparts. JLG, for example, will display three products demonstrating its focus on the mainstream market in Asia. They include the 4045R electric scissor, 1932R electric scissor and the 1100SJ boom lift at its booth (B3).

The new 40ft working height 4045R features a compact design, offering a 1.14m machine width and is the first JLG electric scissor lift to feature side forklift pockets. In addition, the lift's self-centering feature uses a five-level scissor design with fewer linkage points versus six-level models. Plus an all-steel platform, steel component trays and recessed ground control panel for long term machine durability.

The 1932R is an affordably priced addition to JLG's scissor line, it says. Designed with this lower cost of ownership in mind, the 1932R is offering serviceability, reliability, and durability. It has all-steel swing-out component trays with a layout that optimizes serviceability. The 1932R also features an improved battery charger that allows a technician to programme changes to optimise the battery being used. A simple, easy-to-maintain active pothole

protection system with fewer moving parts and a new platform extension contribute to the lift's features.

The new 1100SJ boom features extreme hostile package, a tailor-made platform for harsh environment applications. The 1100SJ allows operators to reach heights of 35.5m and lift 250kg unrestricted area load capacity. Speed is also a feature; the operator can lift the boom from ground to maximum height in two minutes. The steel covered powertrak and control panel, steel fuel tank and JLG special designed extreme hostile package are also included.

AI

■ See extensive coverage of all the manufacturers and products on display at APEX Asia in the full Showguide in the October issue of *AI*.

JLG 1100SJ boom lift.



DINGLI EXTENDS ITS RANGE

China's biggest manufacturer of aerial work platforms Dingli will present more than 10 products at APEX Asia, with three of them being launched at the show (booth B2).

Those are the GTBZ20AE telescopic boom, GTBZ20SU ultra boom and JCPT1612DC scissor, which will make their first appearance at the exhibition.

The GTBZ20AE is designed to be easy to operate. It not only has a fast lifting speed to its 20.23m working height but also a competitive 11.14m horizontal extension and a 230kg loading capacity. With compact chassis of 8.61m x 2.49m x 2.44m it is suitable for working in limited space.

The unit boasts 4 x 4 wheel drive and up to 40% gradeability. It has a 420 Ah high-capacity storage battery for power supply, with zero emission, low maintenance costs and long working hours. Compared with the traditional DC motor drive, it can save 10% in energy. Its floating bridge design enhances off road performance.

The 20.3m working height GTBZ20SU ultra deck has a 1350kg capacity. It adopts Dana axle and chassis, with standard configuration of 4WD and 4WS as well as differential lock, which has a stronger off-road ability. The maximum gradeability is 40% and the maximum chassis leveling is 10°. The unit has a large working area of 6.7 m x 2.28 m, as well as the platform slider boom of 2.19m. The 180° rotation has significantly increased its working range, with no limits through the envelope.

The JCPT1612DC scissor has significantly improved work efficiency, enhanced stability, prolonged its service life and can be commonly used in various scissor lifts. The platform can perform at a gradient of 6°.



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Key findings

With the latest Powered Access Rental Market Report now out, the global picture for the MEWP rental market is good, with the US, Europe and Asia-Pacific in many cases exceeding expectations. Matt Brereton, communications manager at IPAF, provides an exclusive insight into its key findings.

The annual Powered Access Rental Market report, exclusively compiled by leading global research intelligence company Ducker Worldwide for the International Powered Access Federation (IPAF), gives essential business insight and offers users a unique opportunity to drill down into certain key markets using a series of economic indicators and measurements not available anywhere else.

In recent years, the reports have tended to contain positive news leavened in most cases by some less positive, often with certain negative factors hampering one country's market or another. IPAF's Powered Access Rental Market Report for 2017, however, is generally very positive across the board, with Europe and the US in particular exceeding expectations and experiencing steady growth.

The UK's Mobile Elevating Work Platform (MEWP) rental market outstripped the wider construction sector in terms of growth by three to one, showing little sign of any cooling on Brexit fears as other parts of the economy seem to have experienced in the second half of 2016 in particular.

In Asia, too, market and fleet size growth were stellar in 2016, driven by Hong Kong, Japan and mainland China, and in the Middle East the market is also booming; the report for 2016 carries for the first time a focus on Dubai.

The only region that did not experience such favourable conditions was Latin America, where the MEWP rental market overall contracted slightly, mainly owing to the impact of a shrinking market in Brazil.

Consecutive growth

In Europe, all the countries under study found themselves with growing rental markets for the first time since the downturn in 2008. Among the stellar performers was Spain, where a resurgent construction sector helped the rental market grow by 7% over the year – a second consecutive year of growth at

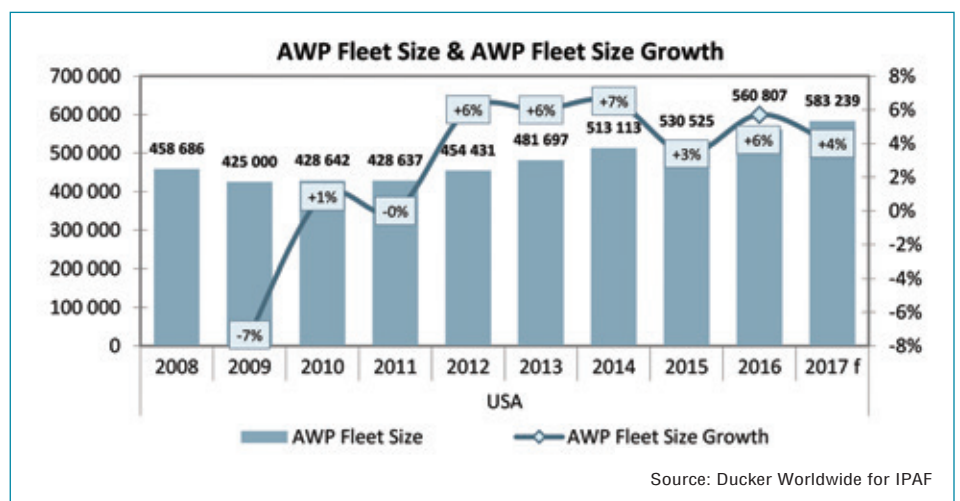
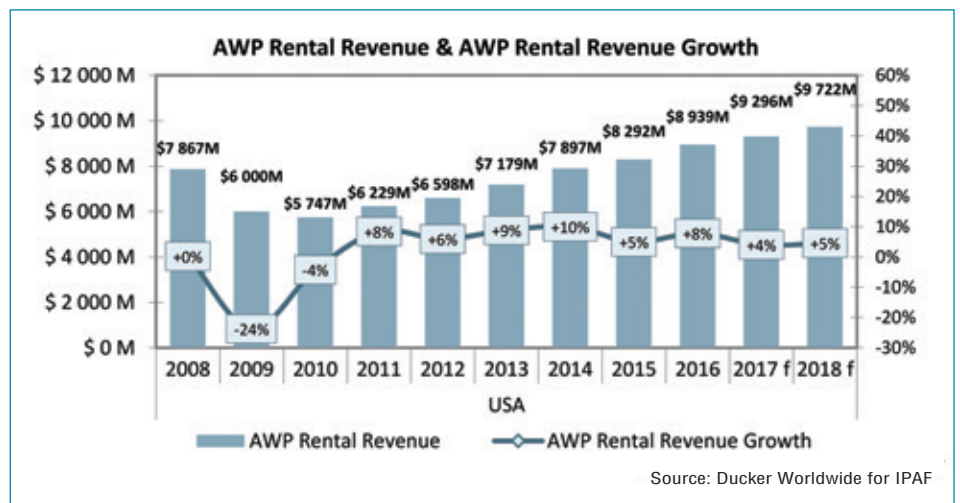
around that rate – while the next strongest growth was 5% in the German, Swedish and Finnish markets and Italy and the Netherlands on 4% growth.

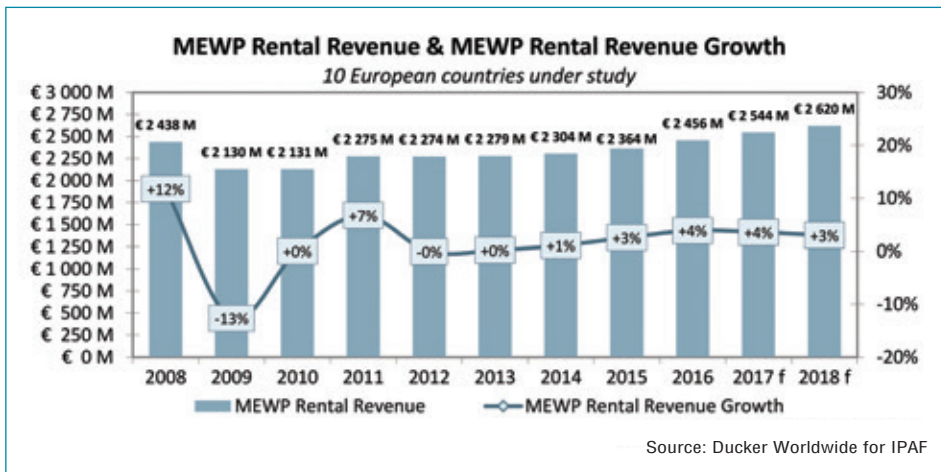
The UK and France grew by 3%, which was the average growth for Europe as a whole over the year. Of the 10 countries under study in Europe, accounting for around 85% of the total current MEWP rental market, Norway and Denmark slightly underperformed in

terms of growth on 1% and 2% respectively.

As a whole, key drivers in Europe were economic growth and falling unemployment, coupled with renewed construction activity in the years following the economic downturn. All countries in the study saw positive growth for the first time since the downturn, and those countries such as Spain that outperformed the European average did so on the back of a reinvigorated construction sector, which also grew by around 7% across the year.

While the construction sector in the UK did not fare so well, growing by around 1% as a whole, the MEWP rental market outperformed that figure by three to one. In more mature markets such as the UK, France and Germany, intense competition suppressed or drove rental rates down, though companies generally increased fleet size and utilisation to compensate. One sure sign of even the most mature global powered access markets still having much to offer was the entry during 2016 of construction plant specialist JCB into





the sector with its new Access division.

A booming construction sector in the US was also credited with a stronger than expected year in which rental companies had previously priced in economic and legislative uncertainty and a change in presidency when giving their outlook forecasts in the closing months of 2015. In 2016 revenue growth was 8%, fleet size expanded by 6% and both utilisation and rental rates also grew by 1%.

The economy and in turn construction sector were comparatively strong in the US and this was the main driver for the positive indicators for the MEWP rental industry, which was once again characterised by mergers and acquisitions activity, including the deal for United Rentals to purchase NES Rentals, which at the time of takeover was valued as a \$352 million business. In Canada by contrast the MEWP rental market remained flat, negatively impacted by unfavourable oil prices and exchange rates.

Acquisition trail

In terms of outlook, the North American market last year was weighing up the impact of the Donald Trump presidency – a promised \$1 trillion investment in national infrastructure would certainly be welcome by the industry at large – as well as new safety standards being introduced in both Canada and the US and the impact these would have.

Mergers & acquisitions have also been a feature in Europe and that activity has continued into 2017 – earlier this year Loxam bought out the Lavendon Group and TVH acquired Gardemann – perhaps driven by a desire for European consolidation and no doubt with an eye to capturing a greater share of emerging markets and new growth on the fringes of the European access industry, in Eastern territories, the Nordic and Baltic states and in Turkey.

There is also growth potential in North Africa and particularly the Middle East, and this year's IPAF market overview includes for the first time a special focus on activity in the United Arab Emirates (UAE). Here the market is growing steadily, underpinned by major infrastructure projects such as Expo

2020 that will guarantee demand for at least the next three years.

Many of these projects are on tight schedules and it seems there is also a motivational shift in terms of regional authorities and main contractors to move to safer and more effective ways of working at height. Other macroeconomic indicators also indicate a positive outlook for the UAE over the next few years, with construction growth and output forecast to continue growing steadily, driving up demand and utilisation rates, though stiff competition is likely to suppress rental rates in the foreseeable future.

On a wider scale, the worldwide MEWP rental fleet size stood at 1.25 million units at the end of 2016. As in the US and Europe, the Asia-Pacific region showed very dynamic growth in terms of burgeoning fleet size, driven in the main by China, Hong Kong and Japan. Latin America, including Mexico, saw the total MEWP fleet size contract somewhat, though this was skewed by figures from Brazil. The fulfilment of key infrastructure delivery and maintenance projects in Brazil following the hosting of both the Rio Olympics and the FIFA 2016 World Cup may be one reason for this, while challenging economic conditions in many countries of South and Central America may also have affected the findings on a

continental scale.

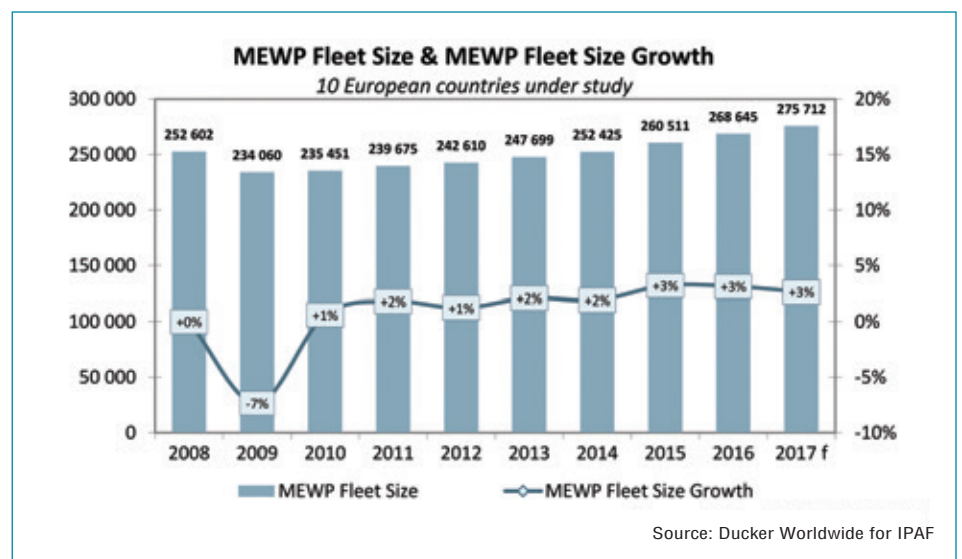
As well as the above headline indicators IPAF's annual Powered Access Rental Market Report also delves into other areas, including MEWP rental penetration, applications, power sources, value growth, investment over a ten-year period, including equipment purchases and typical payback periods. In Europe investment is expected to grow steadily in 2017 but is forecast to plateau in 2018. In the US rental companies significantly increased investment throughout 2016 following several years of no or limited investment.

Rates growth

In both Europe and the US return on investment (ROI) improved slightly, with the average payback period on new equipment decreasing for booms in Europe and on both boom and scissor-type platforms in the US. In comparison, the US MEWP rental fleet showed a marginally better ROI than the European fleet.

Operational aspects over the same 10-year period also come under review, including utilisation rates, average retention periods and rental rates. In Europe utilisation rates were up on average by just under 1% and in the US by around 1% also. Rental rates were up in the US by around 1% but in Europe as whole were down by around the same amount, though some countries such as Spain, Italy and Sweden outperformed and did in fact experience positive rental rate increases of up to 2%.

The Powered Access Global Rental Market Report is compiled each year by Ducker Worldwide exclusively for IPAF and is available in English only. The report is compiled based on interviews with rental companies and other industry experts globally and the research for this year's report were conducted in April 2017. The report is available to purchase in full via www.ipaf.org/reports, while last year's version can be purchased at a 50% discount and older versions of the report can now be downloaded free. AI



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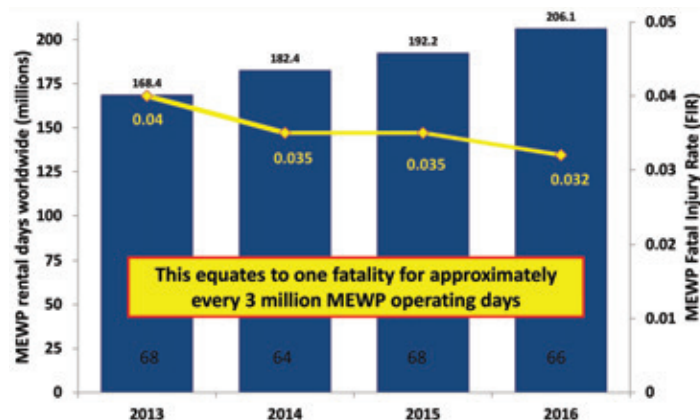
MEWP fatalities decline as global rental market grows

The fatal injury rate (FIR) for mobile elevating work platforms (MEWPs) declined in 2016, despite the fact that the total MEWP rental fleet and the number of rental days worldwide increased significantly over the same period.

The data, exclusively collated and interpreted by the International Powered Access Federation (IPAF), indicate that in 2016 there were 66 reported fatalities involving MEWPs worldwide, compared to 68 deaths reported in 2015. During the same period, the size of the global MEWP rental fleet rose from an estimated 1.17 million units at the end of 2015 to 1.25m estimated at the end of 2016.

In 2015, the number of on-hire rental days was 192.2 million and the number of reported fatalities was 68, giving a FIR of 0.035 per 1,000,000 operating days. In 2016, the number on-hire rental days rose to 206.1m and the number of reported deaths was 66, giving an effective fatal injury rate of 0.032 per 1,000,000 operating days. This is equivalent to one fatal incident every 3.2 million operating days.

Of the 66 reported MEWP fatalities in 2016, the main causes were falls from height, electrocution, entrapment



and overturn of machinery. Chris Wraith, IPAF's Safety & Technical Executive, who compiles the global accident and fatal injuries data, comments: "While it is heartening to see the effective fatal injury rate fall at the same time as the size of the rental market and number of machine operating days have increased significantly, we must not be complacent.

"It is disappointing to see the same main causes of fatalities being repeated year on year, which suggests that the industry as a whole is not learning the lessons from previous incidents – in 2016 falls from height accounted for 38% of the reported fatalities and electrocution 23%. There were fewer fatal overturns (12% of

total fatal incidents, as opposed to 27% in 2015), but entrapments accounted for a higher proportion of the reported deaths (18%) than the year before. In 2015 electrocution and entrapment both accounted for around 15% of the total reported fatalities.

"Investigations show that accidents are most often due to management failings or operator error. This is why in 2017 IPAF is pursuing its 'back to basics' safety agenda, reminding operators and managers of the need for good risk assessment, choosing the right equipment for the job, proper training for users and supervisors, sound technical and safety guidance and a robust incident reporting regime under which lessons are learned."

IPAF CALLS FOR MAYOR MEETING AFTER GRENFELL TOWER FIRE

The Chief Executive of the International Powered Access Federation (IPAF) has written to Sadiq Khan to express members' wishes to work with the Mayor of London and the emergency services in the wake of the Grenfell Tower fire. IPAF member firms want to explore whether taller access platforms could be used in future to help rescue people trapped during similar fires in towers.

The tallest access platform currently operated by the London Fire Brigade can reach up to 32 metres, while Grenfell Tower is 67 metres tall. The letter from Tim Whiteman to Mayor Khan points out that there are several IPAF member companies operating access platforms in and around London that can reach up to 90 metres, and these members are offering to work with Mayor Khan and the London Fire Brigade to see if their specialist equipment and training support could be of use in future.

Mr Whiteman's letter requests a meeting between Mayor Khan, the London Fire Brigade and leading Mobile Elevating Work Platform (MEWP) equipment manufacturers and rental companies to see if their products could allow trained fire

crews to rescue occupants of other tall buildings should a similar incident ever occur.

The machines most likely to be of use would be lorry-mounted MEWPs that can convey up to six people in the platform, which with some modification and the proper training may allow fire rescuers to almost triple the safe operating height.

Acknowledging there may be issues around the design and intended use of existing equipment, Mr Whiteman stresses that IPAF members, including manufacturers, hire firms and training specialists, are keen to work with emergency services to see if commercially available MEWPs could be adapted to work in rescue situations.

If a solution can be found that works for the London Fire Brigade, similar equipment could be made available or placed on standby for fire services in other parts of the UK.



**EUROPLATFORM
LINE-UP CONFIRMED**

The line-up for IPAF's Europlatform conference in Warsaw, Poland, on 14 September has now been confirmed. The keynote address will be delivered by **Pierre Saubot**, Chairman of the Board at Haulotte, while **Wojciech Lisicki** of the Polish Rental Association and Country Manager, Riwal Poland, will give an insider's view of the Polish rental market. **Michał Dębski** from the Department of Inspection Coordination, in Poland's Office of Technical Inspection gives an overview of his work and **Lee Perry**, sales & digital media consultant, and **Euan Youdale**, Editor of Access International, will give media and marketing pointers.

There will be a panel discussion on developing new access markets featuring **Jacco de Kluijver**, VP Sales and Marketing EMEAR at Genie, and **Brian Stead**, the UK MD of Loxam, with further participants yet to be confirmed.

IPAF continues to grow global presence

Over the past few weeks IPAF's country and regional reps have been exceptionally busy winning new members and breaking new ground in Europe, the Middle East and India.

In Europe new members, training centres and languages are coming on stream, with the latest addition being a Riwal training centre in Poland. Good progress is also being made in Slovenia, while Denmark, Finland and Iceland new members are in the process of joining and training centres have begun the process of being audited so they can deliver IPAF accredited training in new languages and territories.

In the Middle East, a clutch of new training centres coming online across Dubai, Qatar and

Saudi Arabia, with pioneering training centres set to open in new territories in the region including Kuwait, Bahrain and Iraq. In sub-continental Asia there are likewise several new members and training centres in the pipeline in India, while the first member has just signed up in Pakistan.

There have also been important memoranda of understanding signed between IPAF and the International Institute Risk Management, Abu Dhabi Vocational Education & Training Institute, the Abu Dhabi Sewerage Service Company, Occupational Safety & Health, Abu Dhabi and the Occupational Safety & Health Association of India.

IPAF President Nick Selley recently visited the IPAF Middle



Nick Selley and Jason Woods in IPAF's Middle East office

East office and comments: "I was delighted to visit IPAF in Dubai in my first overseas visit as President. The Middle East region is one of the fastest growing areas for IPAF training and it was good to hear about our regional representative Jason Woods's initiatives and also his plans for India."

NEW MEMBERS

IPAF welcomes the following new members. Full contact details can be found in the Membership Directory at www.ipaf.org

COMPANY ASSOCIATE

■ **Multiplex Middle East**, Dubai, UAE

DEALER/DISTRIBUTOR

■ **Platform Hydraulics Ltd**, Ludlow, Cheshire, UK

■ **Watling JCB Ltd**, Whetstone, Leicestershire, UK

■ **Uygunlar Dis Ticaret AS**, 34810 Istanbul, Turkey

HIRER/RENTAL

■ **Toggenburger & Co AG**, 8408 Winterthur, Switzerland

■ **Evrorent DOO**, 1000 Ljubljana, Slovenia

■ **Wilhelm Reitingher GmbH & Co KG**, A4490 St Florian, Austria

■ **John Power Plant Sales Ltd**, County Wexford, Ireland

■ **Cannon Access Ltd**, Tiptree, Essex, UK

■ **M Womack Ltd**, Wakefield, Yorkshire, UK

■ **BlueLine Rental**, NJ 08056, USA

■ **Italiana Elevazione Srl**, 20090 Pieve Emanuele (MI), Italy

■ **Wim Verhuur Bvba**, 2860 Sint-Katelijne-Waver, Belgium

HIRER/RENTAL (GROUP)

■ **Riwal Denmark A/S**, 5220 Odense SØ, Denmark

■ **Rapid Access LLC – Kuwait**, 13155 Safata, Kuwait

INSTRUCTOR

■ **Michael J Haslam**, Wednesbury, West Midlands, UK

MANUFACTURER

■ **Heda Vinç Nak Metal İnş Mad San Tic Ltd Şti**, 42290 Konya, Turkey

■ **ZMG Industries (Suzhou) Co Ltd**, 215123 Suzhou, China

SERVICE

■ **Trident International Private Ltd**, Pune, India

■ **Changzhou Cosmos Emolux Metal Products Co Ltd**, 21300 Changzhou, Jiangsu, China

■ **FASB Linea2 Srl**, 23894 Cremella (LC), Italy

■ **Technical Safety Consultants**, Dubai, UAE

■ **SWAN&KOI Srl**, 20121 Milan, Italy

■ **EIDE – Embragatgesi I Derivats**, 08211 Castellar del Valles, Barcelona, Spain

TRAINING

■ **Offshore Painting Services**, Liverpool, UK

■ **Capital Equipment Services Ltd - Bright Training Institute**, Thiruvallur District – Chennai, India

■ **Civis DOO**, 2000 Maribor, Slovenia

TRAINING CENTRES

■ **ReachMaster Inc**, TX 77339, USA

■ **Omega Powered Access Limited**, Middlesbrough, Cleveland

■ **Manitou Brasil Manipulação de Cargas Ltda**, 13.280-000 Vinhedo SP, Brazil

■ **Riwal Poland SP ZOO**, Duchnice 05-850 Ozakow Mazowiecki, Poland

■ **Boels Verleih GmbH**, 47877 Willich, Germany

■ **HKL Baumaschinen GmbH**, 44379 Dortmund, Germany

■ **Alpha Safety Training Ltd**, Forestfach, Swansea, UK

TRAINING CENTRES (SATELLITES)

■ **Aver Asia Rental Sdn Bhd**, 81600 Pengerang, Malaysia

■ **Boss Training Ltd**, Wednesbury, West Midlands, UK

USER

■ **Cedardale Aboricultural Specialists Ltd**, Hackney, Hampshire, UK

CAP ASSESSMENT CENTRE

■ **Plantfinder (Scotland) Ltd**, Dundonald, Kilmarnock, Ayrshire, Scotland

IPAF DIARY

IPAF will be at these events:

2017

16-18 August 2017

Expo Proteção 2017

Expo Center Norte, Sao Paulo, Brazil

8-9 September 2017

Platformers' Days 2017

Hessen Hotelpark Hohenroda, Germany

14 September 2017

Europlatform 2017

Warsaw Marriott Hotel, Warsaw, Poland

20-22 September 2017

JDL 2017

Beaune, France

20-23 September 2017

BICES 2017

New Beijing International Exhibition Centre

5-7 October 2017

Giornate italiane

del sollevamento (GIS)

Exhibition Centre of Piacenza

12 October 2017

ALH Conference & Awards

Marriott Biscayne Bay Hotel, Miami, USA

31 October-3 November 2017

APEX Asia in conjunction

with CeMAT Asia

Shanghai, China

7 November 2017

IPAF Middle East Convention

Abu Dhabi, venue TBC

8 March 2018

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Full details are at www.ipaf.org/events

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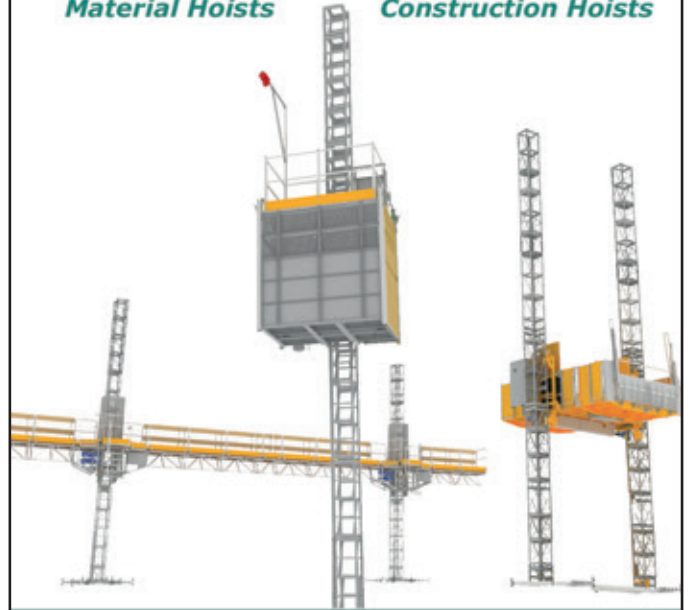
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Raising the stakes

Euan Youdale met with the heads of Sany Palfinger, XCMG and LGMG, in China, to find out about their new access divisions and their global ambitions.

The competition in China is really heating up now that some of the big construction manufacturers in China have set up their own access divisions over the last 18 months. They include Sany Palfinger, XCMG and LGMG, all of which are interviewed in this feature.

Significant growth in China is happening despite the lack of specific regulations for the access sector; a situation set to remain unchanged in the near future.

One of the reasons for this, pertinent to the

issue of safety, is the increasing litigiousness of Chinese society. The relatively new threat of being sued is having an effect in forcing a higher concentration on safety.

Also, general regulations for worksites are developing; in the past an injury could cost the company involved around RMB 200000 (\$30000) in fines, now accidents cost five to six times more.

There are other reasons too for the access sector's rise, those being a reduction in the cost of production for scissor lifts, as they become more common and the components more readily available, along with the well-documented rise in labour costs.

Then, of course, there is the increasing influence of major global contractors, based outside China, that require their established onsite work practices to be copied when working in the country.

On top of that the rental model is growing in line with the popularity of access equipment.

LGMG

These growth trends and advantages are not left unnoticed by the big construction manufacturers in China. Lingong Group Jinan Heavy Machinery (LGMG), for example, has been watching the sector with interest and feels it is the right time to move in. The company has already started widening its output beyond its core medium-sized construction equipment, in which it has always specialised, to offer both ends of the size spectrum. This includes access equipment, which the company has started producing on a large scale. And, true to form, LGMG is interested in starting a partnership with an established manufacturer in the access equipment sector.

As Zhi Kaiyin, LGMG general manager explains, the industry has mainly concentrated on the mid-size construction products, like loaders and excavators but with the downturn in those products, larger and smaller machines have taken a greater proportion of sales. The company's conscious decision to invest in those



Zhi Kaiyin, general manager of Lingong Group Jina Heavy Machinery (LGMG).

areas has seen it start two joint ventures, one with Sandvik, as part of its LGMRT mining and rock technologies segment, and the other with Volvo, representing the entire SDLG subsidiary. Under the two arrangements Sandvik owns 65%, while Volvo has 70% ownership of the respective ventures.

It is more than likely an equally well known company in the access sector will become the focus of a similar arrangement in the not too distant future, explains Zhi.

The company started producing loaders 45 years ago with the medium range 3 tonne and 5 tonne segment making up 80% of the business.

In the large sector the company already has a 40 tonne truck and now has drilling rigs thanks to its partnership with Sandvik.

Then, in the small segment, there are the 3.5 tonne to 15 tonne excavators and now MEWPs.

The plan is to offer the customer a full set of products. The manufacturer believes 27000 MEWPs were produced in China during 2016 across the eight biggest manufacturers producing in the country.

By the end of 2017, that volume will have reached 40000 with LGMG having produced produced 4% of that volume, says Zhi.



Lean manufacturing at LGMG's scissor facility.



those being that operators in China do not have the same 30 years of market and training experience behind them that ensure each new trainee will use the equipment properly. Indeed, the operators of MEWPs in China have often not come across them before and the equipment undergoes rougher use and needs to be designed accordingly. “So the premium design has to be modified for the Chinese market,” says Zhi.

The 4m to 14m electric scissors represent the core of the product line. There is also a three-year plan, which includes nine different product types, ranging from 3m-30m working height. Rough terrain scissors will follow soon, with a 16m unit in testing and 8m, 10m, 12m and 13m machines for the future.

Self propelled booms are also very much part of the equation, with 14m-30m booms.

All these products are designed to cover 80%-90% of a typical rental company’s needs. “There is a full plan in place to sell and service these machines,” says Zhi.

As explained, with access being a particularly rental-related equipment type, LGMG is asking its distributor-base to become rental companies for the purpose of expanding the access market. So far 20 of the company’s 160 dealers have developed into AWP rental companies. One of them is Tongguan, a Volvo excavator and LGMG loader dealer, which has 1000 units in its fleet. Another example is Liaoning Shanzhong, also with 1000 units, having started last year in the rental business.

“The Chinese market is new for rental and must learn to use these machines and service them, plus the safety side. We do not have that experience in this country so we have to teach rental companies on site to maintain and service,” confirms Zhi.

The company has also used its experience with its association with Volvo to create lean manufacturing at its plant.

Before the end of the three years there will also be telehandlers in production, amounting to nine different product types.

Concerning the competition from major manufacturers of MEWPs that have set up in

LGMG’s target is to reach a minimum of 10% of the total output figure.

The company is already seeing an increase in both its domestic and export market, with China providing a 20% -30% increase in sales in the sector year-on-year.

So far, the major focus for the company has been in the domestic market and, in an inspired move, it has been convincing its existing distributors to become rental companies.

“The China market is new for rental. We do not have this experience so we are learning how to teach rental companies to maintain products and provide service,” explains Zhi.

LGMG believes it is a step ahead of the competition thanks to its cooperations with Volvo and Sandvik, which, in turn, have provided their experience in training and service, already establishing excavator and loader training for the Chinese market. “We understand the required levels of parts stock. We have learned from this and are ahead of the others,” says Zhi.

Beyond common international requirements for service and design, the Chinese market also has unique requirements that companies wishing so succeed must understand. One of



Sany Palfinger SGD1012 in the company’s headquarter’s entrance hall.

the country, Zhi says, “The premium brands in China are welcome as they help the market develop and understand the product. There will also be another benefit as more machines, particularly scissor lifts are produced in the country - the cost will come down.”

In 2015 the average cost if a 10m scissor was RMB 100000 (\$15000), now a new unit should cost around RMB 80000 (\$12000).

Adding to the company’s intentions to invest or partner in an access-related manufacturer, Zhi explains there is nothing specific in sight yet. “We are looking for one company for the global market. It is not easy to find the right one.”

Sany Palfinger

Another major company making headway into access is Sany Palfinger. Its Aerial Work Platform division, launched last year and has a different aim to its crane segment, which has been its mainstay so far, in that its products will be sold globally, hence the move to its current location in Rudong, close to the Shanghai, on the coast. The first factory was set up in Ningxiang, close to Changsha, due to its plans to sell the partnership’s crane products in China and Asia Pacific.

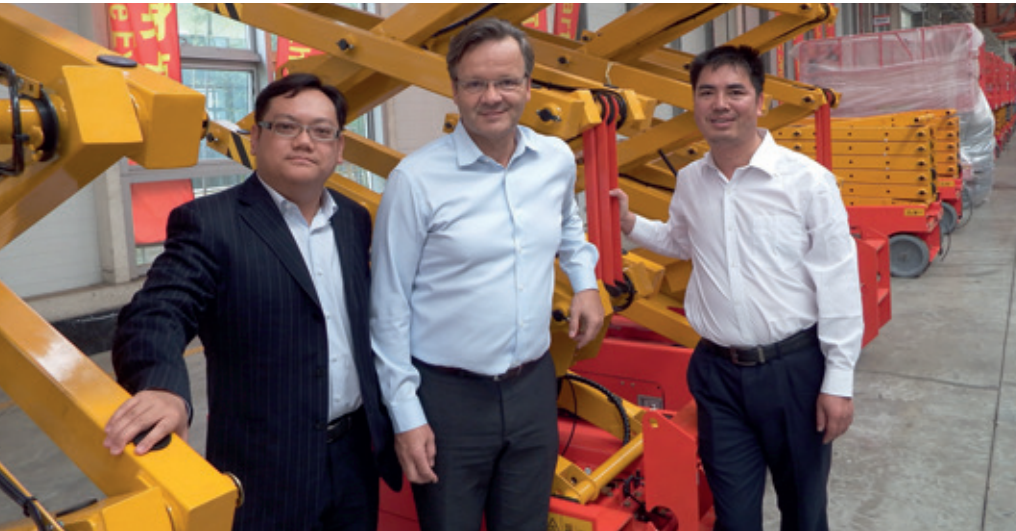
According to Johan Koenigshofer, chairman of the board of Sany Palfinger, the joint venture always intended to extend its offering from cranes to include aerial work platforms too, despite the product type being completely new for both companies.

The partnership represents an equal 50%/50% split between the two companies when it comes to investment in the brand. The joint venture also saw both companies taking a 10% stake in each other’s business.

All research and development takes place in China, using Austria-based Palfinger’s design expertise from its knuckle boom crane



Scissor lifts and truck mounts constitute the first product offering from Sany Palfinger.



From left: Gary Wan, deputy general manager, Sany Palfinger Aerial Work Platform division; Johan Koenigshofer, chairman of the board of Sany Palfinger; Tiger Peng, general manager Sany Palfinger Aerial Work Platform division



products to make models suitable for each market, for example including specific products for China.

The joint venture's initial focus is on perfecting its range of slab scissors. There are four models with 6m, 8m, 10m and 12m working heights, as well as a narrow version of the 8m model. Next up will be a 14m working height unit.

"There is an opportunity to get into the Chinese market, and we believe strongly that it has only just started. And we think that with high quality innovation it will be a very good market," says Koenigshofer.

Palfinger also has a full range of truck mounts thanks to its Palfinger Platforms operation in Germany for larger machines and Palfinger Platforms Italy for the lighter class vehicle mounts. This expertise has also been used in the creation of Sany Palfinger truck mounts.

"We want to provide a complete product line for lifting people," adds Koenigshofer, who estimates the aerial work platform industry is growing 15% to 18% in China each year.

As mentioned, one element that will push that percentage growth up is more regulation. "There is no regulation yet defining lifting

of people, although there are some talks. Regulation will change the market quickly." Sany Palfinger is in the process of finalising CE Marking certification of its scissor units for the wider market. The venture will also benefit from the existing distributor network in Southeast Asia and in Europe through parent company Palfinger.

"We are not in North America yet but we are expecting the Sany organisation in North America will bring us to that market."

While Palfinger is the biggest manufacturer of knuckle boom cranes in the world, with total annual revenue of Euro1.3 billion, including Palfinger Platforms, Koenigshofer believes the potential revenue for the company in the global AWP market is much greater. The plan is for the access to provide at least 50% of the revenue that Palfinger now generates on its own in the relatively near future.

Sany Palfinger is also offering a range of truck mounted platforms for China. "We will make changes for specific requirements in China, like a combined crane and platform," explains Koenigshofer.

The reality is, however, the truck mount market in China is a very small one, with no major growth prospects in the near future. Therefore, in China the focus will be on scissor lifts.

Concerning the heavy competition in the scissor sector, Koenigshofer is not worried. "There are more than 100 manufacturers today but in five years' time 40 of them will have gone."

Tiger Peng, Sany Palfinger aerial work platform division managing director, believes product development is key for China, which is unique in its requirements. Peng says the development of software and control systems are vital to respond to the unique needs of operators in the country, who are often not used to these machines and therefore can use them roughly. "It is not easy to train operators in China we are developing software that will

help them use the equipment."

The Sany Intelligence unit is constantly investigating how to save energy and therefore costs in the product. This includes when the scissor stack is being raised and lowered. In short, the efficiency will be built into the structure of the units, with wider services like telematics, GPS and data transfer part of the design process. "The products will be different. People have different ideas now about what they need."

Peng transferred to the access division from the excavator side of the business at Sany, and therefore has a good understanding of high volume products which the Sany Palfinger will be focusing on.

"We are looking at products with a high population, so not big boom yet. Plus we will look at tailored products, like truck mounts that only a few customers need."

The plan is to have one factory for the access division's global needs. At the moment that factory has a capacity of 5000 units per year, although the land available at the Rudong location will allow it to double production.

As booms are added to the company's product range, the view is they will account for some 15% of total volume at the factory – and the company says it will have completed a self propelled range in the next three years. On top of that, Sany and Palfinger has many existing facilities between them that could be adapted in the future to AWP production.

The company's ambitions are reflected through its revenue expectations, with a current RMB300 million (\$45 million) revenue that it wishes to double within the next five years. That will come from an initial focus on China, followed by Southeast Asia and then CE Marked countries.

Koenigshofer adds, "We will fight to take every chance that we have. The market



XCMG boom at the manufacturer's testing ground.

is fragmenting and I think that 25% of products in Europe and North America will be represented by Chinese manufacturers. If customers can see better service from another company they will go to that company.

“It is not just about residual value, you have to be able to sell the product.”

XCMG

Another very well-known generalist is XCMG, and it has some big ambitions too. Its general manager Li Qian Jin points to the company's state-owned status as a major advantage, in that it is able to invest heavily in any sector it chooses, and there is no doubt access is seen as the next big thing in China.

The new division Xuzhou Firefighting Safety Equipment is based in a former crane factory of the XCMG group in Xuzhou. Although this is not the first time the group has produced aerial work platforms. Back in 2008, it was producing telescopic booms with



Li Qian Jin, general manager of XCMG's Xuzhou Firefighting Safety Equipment division.



22m, 28m and 32m working heights with luffing jibs, plus 38m and 40m units, using the manufacturer's crane boom technology.

At the time the shipping industry was developing fast and self propelled booms were required, however it was a small division and beyond shipyards there were no requirements for access equipment.

Cranes, on the other hand, were booming, so it was natural they were the dominant production item. It was not until 2012 that access equipment started showing signs of being a serious contender, and so it was around 2014-2015 that XCMG started to turn its attention again to access.

Incidentally, at that time XCMG had a



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REGION REPORT: CHINA

truck mounted loader crane division which also started producing scissors. It meant there were two divisions in the group that were effectively competing against each other. It was decided the truck division would concentrate on truck mounted platforms, while Xuzhou Firefighting Safety Equipment would solely produce a complete range of self propelled models.

“We have a long term strategy but we have to start with the products that are most popular and most in demand,” says Li.

“We want to produce safe, reliable, efficient and environmentally-friendly machines. Everything we do now is based around these factors.”

The hope is to become an international brand on the same scale as the top two manufacturers JLG and Genie, says Li. “The long term vision is to become the market leader, although we realise that is a long way off.”

“We hope that when people talk about the access industry they will talk about XCMG.”

This includes plans for growth in Europe.

In China, XCMG’s own rental company subsidiary Guanglian, started in 2011, will help, and, at the moment, most sales of access equipment goes to this rental concern. The advantage is that end users get the opportunity to test the XCMG product in the field.

Although the percentage is reducing, last year Guanglian took 95% of XCMG’s access equipment. This year it is set to be 70%, with the remaining 30% going to rental customers, mainly in China.

Those percentages amount to 1000 units last year and 2000 units this year, with a production capacity of 600 units a month – bearing in mind XCMG’s extensive facilities and buying power this could increase by as



XCMG scissors lined up ready for delivery.

little or as much as is required.

China has been divided into six territories for access, each with its own manager focusing on sales, as well as after sales service and parts.

Li believes the strong support and cash flow XCMG has from the state will be to its advantage, along with the strong team that has worked for the company for many years.

As far as export sales are concerned the company relies on its XCMG Overseas subsidiary.

Although Li is of the view that XCMG needs to build sales in China before making major inroads abroad, there is still a move to identify overseas potential from the start.

The access division has five employees seeking clients outside of China that work alongside XCMG Overseas. At the moment it covers Southeast Asia and northern Asia, including Thailand, Korea and, as an aside, a big order from Turkey and another order from

Algeria.

Export currently stands at about 15%, although the wish is to increase that significantly, with ultimately a move into North America, which for most Chinese manufacturers is the biggest challenge of all.

“I would not say it is impossible but as a newcomer you are the snake – it is not that easy for the snake to swallow the elephant,” explains Li. “XCMG access is at an early stage.”

Would XCMG consider acquiring an existing company somewhere in the overseas market?

The answer, says Li, is yes. And, as a state-owned company XCMG may be in a better position to do that than others. However, the time has to be right and at the moment XCMG is concentrating on developing its own brand and becoming respected and well known in the global market. **AI**



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Strong ambitions

AI visited Klubb, France's new manufacturer of van mounts and, more recently, truck mounts.

Klubb has come a long way since starting up as a manufacturer of van mounts in 2015, with its headquarters in Ferrières-en-Brie, close to Paris, in France.

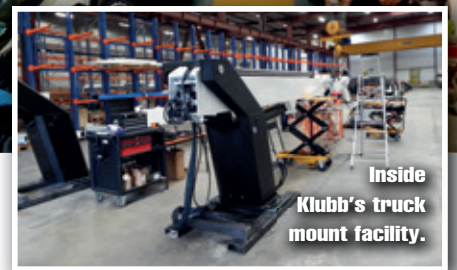
More recently it has moved into truck mounts with the acquisition of the tangible assets of Comilev, a well known truck brand that had fallen on difficult times and gone out of the business. Production of these truck mounts will take place in a 13000 square metre second factory, newly-launched in June, and situated a short distance from the head office.

The pair of production sites form Klubb, which represents just one part of the Gelev group. The other arms of the company include Klubb France, which distributes Klubb's products in the country, as well as tracked platforms manufactured by Hinowa. Then there is Mobitec, which specialises in custom-fit outs of utility vehicles, both platform mounted ones from Klubb and

Delta Services helps arrange financing and is responsible for the used equipment segment of the company which often forms part of new product deals; while TFC handles the delivery of finished products in France and Bureau d'études provides the R&D for Klubb and third parties.



Van mounts lined up at CPL, Klubb's UK distributor.



Inside Klubb's truck mount facility.



Julien Bourrellis, president of Klubb.

Until the turning point in 2015, its founder Julien Bourrellis headed up Time France, an independently-owned subsidiary for Time International's products in France since 2001.

The key reason for creating Klubb was the potential in the export market, an area which it was unable to target as a France-only distributor until that point,

says the company. Since then the company has set up a distribution agreement in the UK with CPL, which assembles the units for the UK market, much as Klubb France does in its own country.

The UK is of course one of the world's top two van mount markets, along with France and so a strong representation there is vital. Other markets like Spain and Portugal are also on the up, as far as van mounts are concerned, as is the potential for Klubb's utility truck mount offering.

Indeed, Klubb says it designs its own components, all of which are manufactured in Europe and then assembled in France, except for those products for the UK market.

Bourrellis' brother Henri Bourrellis is a key member of the team and as export manager has the responsibility for expanding business outside France. "We are trying to develop a dealer network in other countries that are as strong as this one."

The key to this success, says Bourrellis is the simple, strong and long lasting hydraulic machines that Klubb builds. While, he says, service is a vital part of the equation, with 24-hour part supply now available in France, extending to within 48 hours in its export countries.

TRUCK VENTURE

Klubb launched the 13000 square metre truck mount facility in Croissy-Beaubourg, France in June. The new range produced there will comprise articulated telescopic machines with working heights of 18m to 26m, as first presented at Apex in May.

The facility, including a 7000 square metre plant joins the 20000 square metre existing site in Ferrières-en-Brie, dedicated to the production of vans, pick-ups and other chassis.

The Ferrières-en-Brie site opened at the start of 2016 and now manufactures 1000 platforms per year, with the goal being to reach 1700 a year with the new Croissy site, and all product categories included. The market for truck mounts specifically is up to 150 a year in France, says the manufacturer.

"Today the group is showing 20% growth, carried by the development of our export activity," says Julien Bourrellis, president of Klubb.

The first Xtenso3 is an 18.5 m telescopic platform with an outreach of 13.9m. The Xtenso4 has a working height of 21m with 16.4m outreach, mounted on a heavy 16 tonne truck. Finally, the Xtenso5 features a working height of 25.5m, outreach of 20m.



Henri Bourrellis, export manager and Sabine Dorgan, director of marketing and communications.



The Xtenso 5 in action

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Record breaker

ICUEE 2017 has surpassed its previous exhibitor size record, jumping up three acres this year to 28 for the event in Kentucky, USA, during October.

ICUEE, the International Construction and Utility Equipment Exposition, will have at least 900 exhibitors, 20% of which are new to the show.

The event will feature specialised exhibit pavilions for fleet management, safety and green utilities, China and Korean exhibit pavilions and the Lift Safety Zone from the National Commission for the Certification of Crane Operators (NCCCO).

A two-mile Test Drive Zone will highlight on-road equipment and technologies, and the indoor Demo Stage will feature interactive product demonstrations.

"ICUEE comes around only once every two years, and record exhibit space translates to more product innovations on the show floor, so don't miss out," said Tricia Mallett, show director, "We've got plenty of transportation to get attendees around all the lots, a streamlined



layout and plenty of rest areas."

Attendees can operate the equipment in job-like conditions and discuss product capabilities with company technical experts to compare and choose what best meets their project needs. There is also a new show planner app which allows attendees to pre-plan their ICUEE visit. The mobile app will continuously sync to the show planner agenda. Attendees can also play the ICUEE mobile app game for a chance to win prizes in daily and grand-prize drawings.

The online exhibitor directory, with floor plans, is searchable by company name, type of product or market area, booth number and location on the show floor.

Exhibitors

Time International will launch a transit van mount on its stand - find out more details about the VANTEL-29-NE at the exhibition, which represents a transit van debut at ICUEE. Plus Time will have its Phoenix 180I truck mount for the first time at ICUEE, as it just missed the last edition of the show in 2015.

Expect to see all the other usual big names at the show too, for example: Altec, Anderson Hydra Platforms, Bronto Skylift, Elliott Equipment, JCB, Manitex, Palfinger, Scott Powerline and Terex, to name a few.



Xtreme Manufacturing.



ICUEE 2015.

ICUEE 2017

International Construction & Utility Equipment Exposition

VENUE:

Kentucky Exposition Centre, Louisville, Kentucky, USA.

DATES:

3-5 October 2017

www.icuee.com

Altec's stand at ICUEE 2015.



Xtreme Manufacturing will be there, and has confirmed its stand products ahead of the show. It will display a 30000 pound capacity XR3034 telehandler. With a maximum lift height of 34 ft (10.36m) and a 17 ft 6 inch (5.36m) forward reach, the XR3034 is an ultra-high capacity roller boom that can handle some of the largest loads on construction jobsites.

Sister company Snorkel will be displaying two machines: the S3219E electric scissor lift and the A46JRT articulating boom lift. The Snorkel S3219 electric scissor lift sets a new standard within the industry with a working height of 25 ft (7.79m) and a lift capacity of 550 pounds (250kg). The utility specification Snorkel A46JRT rough terrain lift was built with a Kubota V1505 diesel engine, a 2kW AC generator, two grounding loops, and a 5ft (1.5m) aluminium platform.

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Terex will be at the show with its Utility trucks.

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Climbing steady

For the last seven years *AI's* sister magazine *Access Lift & Handlers (ALH)*, covering the North American access market, has published its Scaffold20 listing of the continent's biggest scaffolding companies. This year the Scaffold20 shows single digit growth across the board, reports Lindsey Anderson, editor of *ALH*.

The annual Scaffold20 toplist shows an overall growth of 3.82% from \$6.01 billion last year to \$6.24 billion this year. The annual toplist ranks erecting and dismantling scaffold companies by the previous year's revenues.

Leading the way, again, is Brand Scaffold with an estimated revenue of \$2.5 billion.

The top five companies represent \$5.74 billion of the North American scaffold business, and the top 10 see \$6.06 billion in revenues. While our top five companies remain unchanged – Brand Scaffold, The Brock Group (\$1.4 billion), Safway Services LLC (\$1.609 billion), Brace Industrial Group (\$155 million) and Atlantic Hoisting and

Scaffolding (\$83 million), this year there is no second place tie – Safway edged out The Brock Group.

However, the largest jumps in growth come from companies near the middle of the list. Contractors Access Equipment, Inc. had revenue increases of nearly 24%, upping its figure to \$27.4 million.

Phil Mumford Jr, who manages Contractors Access Equipment with his father, says the commercial scaffolding market was strong for the company in 2016 and is even stronger in 2017.

"We are busy and growing in all of our locations," Mumford Jr. says. "I expect no slowdown in our business for the next 18 months. I even expect Industrial will get busier. We opened new branches in Knoxville and Milwaukee in 2016 and we're opening in Orlando next month."

Another big increase came from United Rentals, which saw a 22% increase from last year's \$6.22 million to \$7.6 million this year.

United's number is now reflective of its recent NES Rentals buyout, so the 22% growth has somewhat of a cushion. United, which purchased NES for \$965 million in cash, came out owning one of the 10 largest independent aerial work platform rental companies in the US.

When asked how the scaffold market is fairing for United, Brent Kuchynka, vice president of corporate fleet management for United, says it's consistent.

"Bidding activity on scaffold has increased for small to mid-level projects from a year ago," Kuchynka says. "Local competition remains fairly consistent, making scaffold rental an affordable option."

AI >

Access Equipment had revenue increases of nearly 24%, upping its figure to \$27.4 million.



RANK 2017	RANK 2016	COMPANY NAME	2016 REVENUE	2015 REVENUE
1	1	Brand Scaffold	\$2.5 billion*	\$2.5 billion*
2	2	Safway Services LLC	\$1.609 billion	\$1.4 billion
3	2	The Brock Group	\$1.4 billion	\$1.4 billion
4	3	Brace Industrial Group	\$155 million*	\$150 million*
5	4	Atlantic Hoisting & Scaffolding (Safway)	\$83 million	\$82 million*
6	4	Performance Contracting Inc.	\$82 million	\$82 million
7	6	Universal Builders Supply	\$80 million	\$75 million
8	5	Layher Scaffolding	\$79 million*	\$78.2 million
9	7	Andamios Atlas Sa De CV	\$37 million	\$35 million
10	8	Sunbelt Rentals	\$35 million	\$31 million*

* Denotes an estimate.

Total solutions

Lindsey Anderson **speaks**
with John Miller **about his**
company Millstone's history
and outlook, and where he
sees the market going.

John Miller is optimistic – but cautious. “Sounds cliché,” he admits, “but with tax and regulatory relief and an abundance of new hires, meaningful growth within the construction industry is hard to come by.”

The president and chief executive officer of US-based The Millstone Companies, Miller is no stranger to tough – and good – times. He has weathered multiple recessions, held the reins of the Scaffold & Access Industry Association as president and prides himself – and the company – on its numerous safety awards.

Headquartered in Upper Marlboro, Maryland, The Millstone Companies was incorporated in 1977 and provides scaffolding, suspended scaffolding, shoring, hoisting and related access products to the market. Millstone and his team will design, estimate, engineer, erect and dismantle a project.

“[We offer] turnkey access operations, self-performed, with an emphasis on safety,” he says.

Miller says business at the moment is steady and the company is awaiting its backlog to progress to the point that its access equipment becomes ready to install on site.

When asked what is fueling the market, Miller has a few theories.

“My best guess is that the low rate, cheap/easy money is fueling the current construction trend,” he says. “Downtown apartments are hot right now as young people are moving back into the cities. Retailers are scaling back



John Miller



Millstone at the Treasury Department.

as sales move online and we are seeing a large quantity of ‘see-through’ office buildings as capacity has far exceeded demand in this market.”

Miller and his team have a number of high-profile and interesting projects happening at the moment. The company is currently renovating the Consumer Finance Protection Bureau Building in Washington, DC and the US Department of Commerce. The company has just wrapped up a 12-year project renovating The Department of Interior, as well.

Currently, Millstone is at work on The Wharf in Washington, D.C., which has 11 construction hoists, scaffolding and shoring throughout the six-building complex.

The Wharf is a 3 million square foot development for the Southwest Waterfront in DC. The 24-acre area will be made up of \$2.2 billion worth of apartments, hotels, offices and retail along a completely new boardwalk. There will be four new piers, a yacht club and 500 boat slips, plus a \$60 million indoor concert venue known as Anthem. The first phases of construction have been completed and the second half of the project, which entails 1.15 million square ft, will be comprised of offices, hotels and residential development. Construction on that phase will begin in mid-2018 and be complete by 2021.

Clark Construction is one of the construction firms on site and has been working with Millstone on the development.

SCAFFOLDING NEWS

INAUGURAL EXHIBITION

New Horizons Global (NHG) Expo has announced the debut of Scafform Global Expo to be held side-by-side with Hydropower & Dam Expo in Las Vegas, US, 7 – 9 November 2018.

NHG Expo has acquired the rights to produce the shows from Demos, the producer and owner of International Scaffolding and Formwork Exhibition – otherwise known as Scafform Expo – held bi-annually in Istanbul, Turkey.

Scafform Expo has been held in Istanbul, Turkey for six years and there has been discussion regarding expanding the show to a global platform, along with Hydropower & Dam Expo, also produced in Turkey.

In searching for a company to produce the show in Las Vegas, the team connected with ConvExx. Huseyin Aslan, managing director of NHG Expo, said, “We looked for an expert in trade show management, marketing and connections in Las Vegas and met the ConvExx team,” Aslan stated. “We believe the company has the team that will help us build our well-known global brand in the United States as well.”

Scafform Global Expo featuring Hydropower & Dam Expo will be held 7 – 9 November, 2018 at the Las Vegas Convention Center. It is anticipated to showcase over 200,000 square feet of exhibit space and activities, and attract 10,000 – 15,000 attendees from across the globe.

Outlook

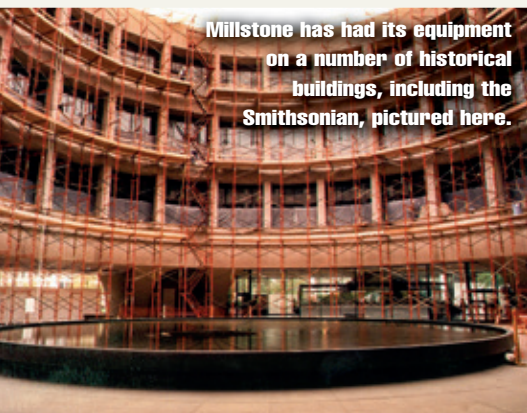
While Miller enjoys renovating some of the greatest buildings in American history (his company has worked on The White House, US Capitol, Hirschorn Museum, US Department of Justice, the US Pension Building and many more), a challenging job is something he greatly enjoys.

“Millstone is always looking for new, innovative access products and services to add to our offerings,” Miller says.

And as he adds to that deep pool of work, Miller plans to grow within and keep an eye closely on market trends. His eldest son, Jacob Miller, joined the company just last year after graduating from the Perdue School of Business at Salisbury University. Miller acknowledges the challenges associated with hiring, despite adding to his team, an issue shared across the industry.

“One of the biggest issues facing the industry right now is, without question, the lack of available talent,” Miller says. “The labor pool of skilled craftsmen/tradesmen has diminished to the point that the future of the construction industry could enter a slow growth period.”

Millstone has had its equipment on a number of historical buildings, including the Smithsonian, pictured here.



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Success stories



Darius Postweiler, Junior Manager at QuadreX Geruestbau GmbH, also relies on the partnership with Layher when erecting industrial scaffolding – for the third consecutive generation. Read his story here. www.scaffoldingstories.com/industry02

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